The Mizzou Investment Fund Management Program

University of Missouri
Robert J. Trulaske, Sr. College of Business

Introduction: The Mizzou Investment Fund Management Program is a student-run investment portfolio that allows undergraduate and graduate students of the University of Missouri to participate in the decision making and management of an endowment fund. Within the framework of an academic class, students analyze securities, set asset allocation targets, and make investment decisions for a portfolio of investment securities. Prerequisites: The class is a dedicated course in the Department of Finance of the College of Business. At the time of application, the applicant should have completed or be enrolled in the following prerequisite courses:

Undergraduate students:
FIN 3000 - Corporate Finance
FIN 4020 - Investments
FIN 4120 - Security Analysis OR FIN 4620 - Investment Strategy of Warren Buffett

Graduate students:
FIN 7410 - Managerial Finance I or equivalent
FIN 7420 - Managerial Finance II or equivalent
FIN 7620 - Investment Strategy of Warren Buffett OR FIN 8360 - Equity Securities Analysis

Benefits of the Program: Participation in the Mizzou Investment Fund Management Program enhances a student’s career opportunities by developing critical thinking and leadership skills. While a career in the investment management field is an obvious choice of students participating in the program, students planning for careers in other fields can benefit from the skills learned and developed in the course. For example, the financial analysis performed when analyzing a company for investment is useful to commercial loan officers of a bank and leadership skills developed by student managers of the fund are useful to business executives and government officials of all types.

Description: Over the course of the semester, students identify and critically analyze securities for potential investment in the fund. Student analysts will develop comprehensive analysis reports and present their recommendations to the rest of the class for discussion and investment decisions. Each student must maintain awareness of economic and market conditions during the semester, especially keeping vigilant regarding his or her selected securities. Officers are also selected to manage key fund activities. The course instructor oversees the class officers and critiques reports and presentations.

Student Evaluation: Evaluation of student performance by the instructor contains both subjective and objective components and is based on factors such as students’ written security analyses, presentation of the analyses, active participation during the class, and effective leadership (for officers).

Admission: Admission to the Mizzou Investment Fund Management Program is determined through a competitive application process. Students accepted into the program may then enroll in the appropriate (undergraduate or MBA) section of the course. Refer to the Application for Admission for the relevant application deadline.
FIN 4820/7820
The Mizzou Investment Fund Management Program

Application for Admission (Spring 2017 Class)

Application deadline: 5:00 P.M., October 14, 2016

Please turn in the completed application form to the Department of Finance, 401 Cornell Hall. Students accepted into the IFM Program will be notified by email shortly after the deadline listed above.

Name: ___________________________  Major: ___________________________

Email: ___________________________  Program (BSBA or MBA): ___________

Indicate the courses you have completed or will complete prior to the IFM enrollment term.

Undergraduate Courses
  ___ FIN 3000 - Corporate Finance
  ___ FIN 4010 - Financial Management
  ___ FIN 4020 - Investments
  ___ FIN 4120 - Security Analysis
  ___ FIN 4220 - Portfolio Management
  ___ FIN 4620 - Investment Strategy of Warren Buffett

Graduate Courses
  ___ FIN 7410 - Managerial Finance I
  ___ FIN 7420 - Managerial Finance II
  ___ FIN 7620 - Investment Strategy of Warren Buffett
  ___ FIN 8330 - Investment Policy and Portfolio Management
  ___ FIN 8350 - Financial Statement Analysis I
  ___ FIN 8352 - Financial Statement Analysis II
  ___ FIN 8360 - Equity and Securities Analysis
  ___ FIN 8370 - Fixed Income Security Analysis

GPA at MU: ___________________________  Expected graduation date: ___________________________

Signature: ___________________________  Date: ___________________________

Please attach the following items:
1. A one-page statement detailing why you are interested in this program
2. A current resume