



Participation in HSU's Ross Whipple Student-Managed Investment Fund is conducted through the School of Business course *Security Analysis & Portfolio Management*. This course provides upper-level students an excellent opportunity to receive hands-on experience in the stock market through analyzing stocks, market trends, and participating in actual trading on the market.

The students analyze which stocks to buy and which to sell in our portfolio of over \$300,000. Students are instructed in successful stock market theories used by highly acclaimed investors. Students make recommendations and present to the class their ideas to buy or sell stocks based on their research. A consensus is reached on the course of action to take and the trade is accomplished.

Students also have opportunities to compete nation wide with students in other student-managed funds from other universities, challenging their knowledge and analysis of stocks. We have won back to back CFA Global Investment challenges in Memphis (the latest in March 2010), being one of only three schools to achieve this distinction. Our team went to the next level each time, with CFA expense-paid trips to New York City to compete in the Americas competition, a gathering of winning regional teams from the U.S., Canada, Mexico, Central and South America.

Our Ross Whipple Student-Managed Investment Fund has beaten the market each of the two years since it has become a full-time class. Our average annual market adjusted returns have had a positive alpha of 14% per year. We were the top risk-adjusted student fund in the country, winning the hybrid division award at the R.I.S.E. X national student fund conference in Dayton, Ohio, in March 2010.

We are honored that four of our students were chosen by Stephens Inc. to be in their financial analyst mentorship program.

The HSU School of Business Student-Managed Investment Fund offers students quality, unique instruction in an energized, student-friendly atmosphere, serving as an excellent component to the school's commitment to provide opportunities for our students to experience the "real world" of business through our programs incorporating *Business Beyond the Classroom.*