



Smart Woman Securities

Research Team Meeting 2/2



CEO Introduction



Sanchya Kansal, Class of 2025

Hometown: Ashburn, Virginia

Major: Commerce and Economics

Past SWS Involvement: Research Team Senior Analyst

Career Plans: Incoming Investment Banking Summer Analyst at Houlihan Lokey

CROs Introductions



Ellie Ferrell, Class of 2025

Hometown: Richmond, Virginia

Major: Commerce (Concentrations: Finance and Accounting)

Past SWS Involvement: 2 semester of SA for Consumer/Industrials and 2 semesters of RA for Industrials

Career Plans: Incoming Summer Analysts at Barclays Investment Bank

Favorite Corner Restaurant: Corner Juice



CROs Introductions

Emily Nguyen, Class of 2026

Hometown: Fairfax, VA

Major: Pre-Commerce

Past SWS Involvement: 1 semester of RA for TMT, 1 semester on I-Board

Career Plans: Private Wealth Management

Favorite Corner Restaurant: Take It Away





Meeting Agenda

SWS Intro



RT Schedule



Action Items



Meet your SAs



RT Expectations

Join the GroupMe!!



Spring 2024: SWS Research Team





SWS Structure

You
are
here!

CEO
Sanchya
Kansal

Executive Board

CFO
Hannah Nguyen

CIOs
Julia Tan &
Joanna Li

CROs
Ellie Ferrell &
Emily Nguyen

CMO
Maya Kanaan

CGOs
Elizabeth Rogers
& Janie Sanborn

CDOs
Gracie Gerhart &
Abby Robinson

CCO
Ava McLaughlin
Leeman

Investment
Board

Research
Team

Marketing
Committee

Global
Macro Team

Probies



Research Team Goals



1

Improve relationships
within industry groups
and across RT

2

Improve quality of
memos and technical
skills

3

Prepare for
spring/summer
internship recruitment

Your Goals? How to align yours with RT's?

1

Improve relationships
within industry groups
and across RT

2

Improve quality of
memos and technical
skills

3

Prepare for
spring/summer
internship recruitment



Friendship

Teamwork → Independent
work

Motivate each other



Mentorship

Ask for help and be helpful
SAs, CROs, Peers

Network and learn from
mentors



Leadership

Memo & Self Expression, the
strong voice

Let your leadership shine



Research Team Structure

Chief Investment Officers (Julia Tan & Joanna Li)

Oversee Investment Board, manage portfolio, and lead investment discussions

Chief Research Officers (Ellie Ferrell & Emily Nguyen)

Lead Research Team meetings, manage Senior Analysts, and oversee industry teams

Investment Board

Review RA memos, select stocks to invest in portfolio, and develop expertise in an industry

Senior Analysts

Lead their industry teams, teach about industry, and mentor RAs

Research Analysts

Research a specific industry, compose an investment memo, and attend RT meetings

SWS Four Core of Investment



Economic MOAT

Industry Trends

Financial Strength

Independent Valuation



Research Team Meeting Structure

Meetings will be **Friday's 2-3pm** in **RRH 256**

1. 5 minute **industry team meetings** at the **beginning** of RT meeting
2. SAs — **Current Events**
3. CROs — **Finance/Recruiting Lessons**
- 4. Guest Speaker**

Industry point competition (industry winner receives a **gift card!**)

- Answering practice problems
- Attending social events
- Volunteering (more on this later...:))

SA & Industry Introductions!



SA Introductions

Morgan Shupack

Hometown: Glen Allen, VA

Major/Intended Major: Commerce (IT and Marketing, Business Analytics)

Industry: Consumer

Career Plans: Capital One Business Analyst Internship next summer!

Favorite Corner Restaurant: Virg





SA Introductions

Caroline Longest

Hometown: Richmond, VA

Major/Intended Major: Commerce
(Management, Entrepreneurship)

Industry: Consumer

Career Plans: Consulting

Favorite Corner Restaurant: Take It Away





Consumer Industry Info

- **Overview**
 - Companies that make and sell products for direct use by buyers.
- **Subsectors**
 - Retail, Restaurant, Hospitality, etc.
- **Company Examples**
 - Lululemon, Colgate, Nike, Pepsi, etc.
- **Industry Trends**
 - Media/Tech changes
 - Supply Chains
 - Sustainability
 - Retail
- **Who Should Join**
 - Anyone! Especially those interested in researching brands that they are familiar with or use.



Coca-Cola

lululemon

L'ORÉAL



SA Introductions

Yashika Boddu

Hometown: Aldie, VA

Major: Economics (Finance, Public Policy) + Art History

Industry: FIG!

Career Plans: Corporate Law (and then Immigration Law)

Favorite Corner Restaurant: Chipotle or Mellow Mushroom





FIG Industry Info

- **Overview**
 - Investing in companies that handle financial products and transactions
- **Subsectors**
 - Asset Management, Insurance, Debt Restructuring, Investment Banking, Financial Technology
- **Company Examples**
 - Barclays, Goldman, Morgan Stanley
- **Industry Trends**
 - Ongoing digital transformation and engagement increase in AI (increasing of financial technology)
 - Increased personalization
- **Who Should Join**
 - Anyone is welcome! These firms have a huge impact on the companies we interact with everyday and could be somewhere you end up working



SA Introductions



Riley Martin

Hometown: Midlothian, VA

Major: Computer Science and Economics

Industry: TMT

Career Plans: Software Engineering

Favorite Corner Restaurant: Corner Juice





SA Introductions

Neha Vazarkar

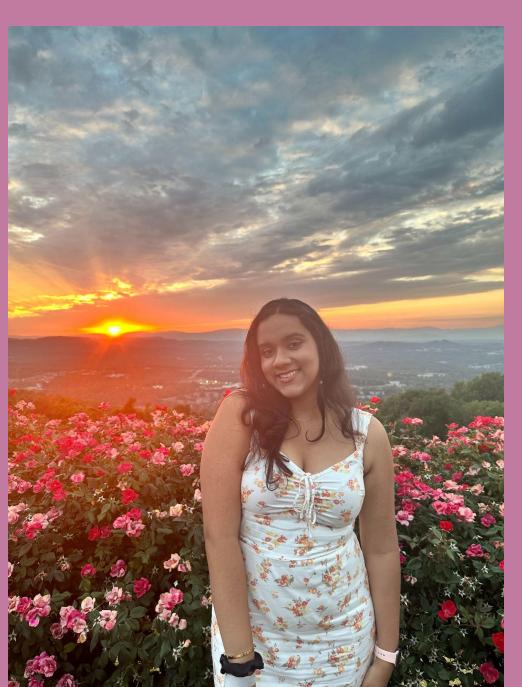
Hometown: Mahwah, New Jersey

Major/Intended Major:
Pre-Commerce, Computer Science

Industry: TMT

Career Plans: Investment Banking

Favorite Corner Restaurant: Corner Juice



TMT Industry Info



- **Overview**
 - An industry that includes companies on new technologies
 - Companies that depend on research and development (R&D)
- **Subsectors**
 - Hardware, semiconductors, software, media, cybersecurity, and telecom
- **Company Examples**
 - Microsoft, IBM, Adobe, Netflix, Meta
- **Industry Trends**
 - Growth of generative AI
 - navigating privacy, cyberattacks, government regulations
- **Who Should Join**
 - Everyone - particularly those with an interest in technology or data science!





SA Introductions

Gracie Brown

Hometown: Oakton, VA

Major: Batten

Industry: Healthcare

Career Plans: Global Public Service Consulting

Favorite Corner Restaurant: Kuma



Healthcare Industry Introduction

- **Overview**
 - Companies that provide goods and services to treat patients with curative, preventative, rehabilitative care
- **Subsectors**
 - Pharmaceuticals, biotechnology, medical equipment & distribution, facilities, and managed healthcare
- **Company Examples**
 - Pfizer, UnitedHealth, & Molina
- **Industry Trends**
 - AI in diagnostics & drug development
 - Telehealth & telemedicine
 - Remote patient monitoring
- **Who Should Join**
 - Anyone! - learn how to invest in companies that improve our quality of life!





SA Introductions

Kendall Freese

Hometown: Brookline, MA

Major/Intended Major: Pre-Comm
and Applied Stat

Industry: REITs

Career Plans: IB

Favorite Corner Restaurant: Asados



REITS Industry Info

- **Overview**
 - Companies that own or finance income-producing real estate
- **Subsectors**
 - Industrial, Retail, Self-Storage, Infrastructure, Data Center, Office, Lodging, and Health Care
- **Company Examples**
 - Public Storage, Realty Income Corp, STAG industrial, and Welltower Inc
- **Industry Trends**
 - Rising inflation
 - Mortgage interest rates
 - Remote work
 - E-Commerce
- **Who Should Join**
 - ANYONE:) Learn how to invest in companies that are all around us and are the foundation of the economy
 - Last semester I pitched a company that owned Barracks!





SA Introductions

Sandra Seng

Hometown: Springfield, VA

Major/Intended Major:
Pre-Comm/Econ and Data Science
Minor

Industry: Industrials

Career Plans: Consulting

Favorite Corner Restaurant: Kuma



Industrials Industry Info

- **Overview**
 - Companies that deal with producing, manufacturing, and distributing goods and services
- **Subsectors**
 - Aerospace, construction, machinery, manufacturing, etc
- **Company Examples**
 - Boeing, Deere & Co, General Electric, Lockheed Martin
- **Industry Trends**
 - Automation and digitalization
 - Internet of Things (IoT)
 - Supply chain responses
 - Sustainability
- **Who Should Join**
 - Anyone! Especially those interested in economics, as industrials substantially impact and reflect the greater economy





SA Introductions

Mariel DiNatale

Hometown: Kennett Square, PA

Major/Intended Major:
Pre-Commerce/ Politics Minor

Industry: Energy

Career Plans: ESG & Impact Investing

Favorite Corner Restaurant: Take it Away



Energy Industry Info

- **Overview**
 - Investing in companies that focus on exploring and developing oil and renewables
- **Subsectors**
 - Oil and Gas, Nuclear Energy, Renewable Energy, Energy Development Technologies
- **Company Examples**
 - ExxonMobil, Shell, Chevron, Centrica, Valero Energy Corporation
- **Industry Trends**
 - Decline of Fossil Fuels
 - Growth in Renewable Energy
 - Exploration of Nuclear Energy
- **Who Should Join**
 - Anyone! Energy affects basically every aspect of our lives.





Spring 2024 Schedule

| Date | Session Topic | Deliverable | Deadline |
|-------------|---|--------------------------|-------------|
| February 2 | First Meeting Info- Review Semester Schedule, Industry Groups, Expectations | Industry Preference Form | February 4 |
| February 9 | Basic Skills/Networking/Recruiting Workshop | | |
| February 16 | Investing methods/ Qualitative Analysis, Introduce Finance Case Study | Initial Investment Ideas | February 18 |
| February 23 | Basic Financial Statements/Ratios/Earnings Call Analysis | Further Research | February 25 |
| March 15 | Activity | Memo First Draft | March 17 |
| March 22 | Comparables | Comparable Analysis | March 24 |
| March 29 | DCF Valuation Part I | DCF Pt.1 | March 31 |
| April 5 | DCF Valuation Part II | DCF Pt. 2 | April 7 |
| April 12 | How to be successful in an internship/Common Skills | Final Memo | April 14 |
| April 19 | End of Semester Party | Pitch Slides | April 21 |
| April 24-26 | Stock Pitch Competition | | |

Meeting Room: RRH 256



Research Analyst Expectations

1. Turn deliverables in **on time**
 - Should view SWS as a class or internship (you wouldn't turn in assignments late for these)
 - Submissions and returns will be done **on Microsoft Teams in the files tab and under the respective deliverable folder**
 - SAs will return feedback within 3 days
2. Be responsive and attend social events planned by your industry group
3. Attend **all meetings** and actively participate during meetings!
 - Email or text Ellie and Emily if you cannot attend a meeting
 - Notify your SA



Bonding Ideas

Required:

- Have **at least one bonding event a month with industry group**
 - Send pics and receive a point!
- Make a groupchat

Optional/Ideas:

- **Team-Building exercises** at industry meeting (ex: highs and lows)
- Movie or trivia night, hiking, coffee
- Practice stock pitches with each other
- Recruiting advice
- Study Groups
- **Picnic on the lawn!**



New Optional Resource: Content Recommendations



Optional:

- Will be shared in slides and weekly recap email
- Each week will provide a recommendation to learn more about Finance!! Content ranging from...

Podcasts



Books



Movies



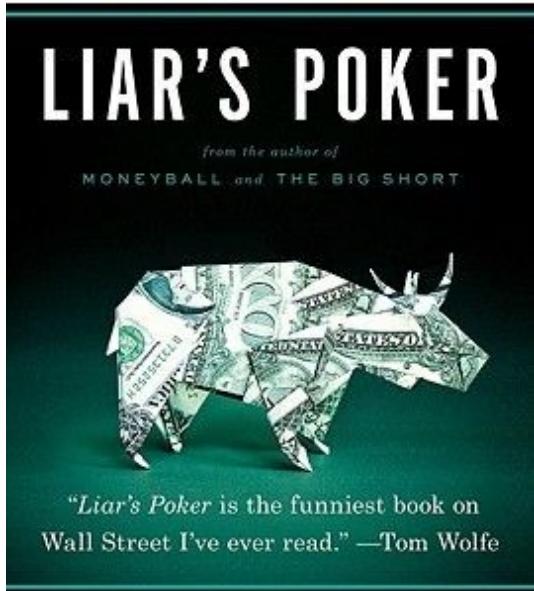


Optional: Content Recommendation

Starting with a Classic Book.... LIAR'S POKER by Michael Lewis

- One of the most famous finance books!!
- A **MUST** read if going into Sales and Trading or Investment Banking
- Notes:
 - Book helps contextualize the wild time period of 80s-90s Wall Street.
 - Michael Lewis describes his own experiences working at Salomon Brothers which are quite interesting.
 - Additionally he gives some insight into the backgrounds of mortgage backed securities and their emergence into Wall Street in the 1980s.

#1 NATIONAL BESTSELLER



MICHAEL LEWIS

EVERYONE INTRODUCE THEMSELVES:

- 1. NAME**
- 2. HOMETOWN**
- 3. YEAR**
- 4. MAJOR / INTENDED MAJOR**
- 5. FAVORITE RESTAURANT IN CHARLOTTESVILLE**



NEXT TIME: Recruiting Workshop



Upcoming February Events!!

Upcoming events:

1. **Rothschild and Co.**: Informational Session (2/6 at 6pm) **Investment Banking
2. **Careers in Finance Guest Speaker**: Private Equity (2/7 at 5-6pm)
3. **Spring Finance Night** (2/15 at 6-8pm)
4. **Roark Capital Group**: Informational Session for Summer 2025 Analysts (2/27 at 7pm)



Action Items

1. Fill out the **Industry preference form** due Sunday, February 4th!!
2. Pay \$5 dues (we will provide link next week!)
3. Join the Spring 2024 **Research Team GroupMe** at this [link](#)
4. Follow us on **instagram** at **@swsatuva** (you'll get an industry point!)

**Happy Friday!
Grab Donuts!**