



# BERKELEY INVESTMENT CONFERENCE

## **Spring 2019 Berkeley Investment Conference Information Packet**

Presented by Berkeley Investment Group

January 2019





## **Challenge, connect and grow at the Berkeley Investment Conference**

### **About Berkeley Investment Conference:**

The Berkeley Investment Conference (“BIC”) is the second-annual, national investment competition hosted at UC Berkeley. The competition allows undergraduate students from across the nation to showcase their analytical talents, to refine their investing skill-sets, and to expand their network of like-minded students and employers.

Teams of 3-5 members will pitch their stock to a panel of professional investors, hailing from some of the most innovative and elite firms. If chosen to move onto the final round, participants will be given the chance to pitch in front of the entire conference audience and win the competition.

As a conference participant, you will have access to exclusive networking opportunities, a chance to compete and win prize money, and the opportunity listen to keynote speakers!

The application will involve a brief summary of your team’s stock-pitch. Each team will pitch an equity, long or short. The selected stock must be over \$500M in market cap and be listed on the U.S. stock market. Your team must present a thesis explaining why/how it is mis-priced, a detailed valuation, and a price-target.

Please note that though applications are free, if accepted to the conference, there will be a fee of \$100 per team.

### **About the Berkeley Investment Group:**

Founded in 1997, BIG strives to unite students who are passionate about investing and to educate UC Berkeley students about investing. BIG officers manage a fund of \$70,000. The officers aim to generate superior returns for the fund's investors using value-investing strategies. As partners with the UC Berkeley Career Center and the Haas School of Business, BIG provides professional workshops, panel discussions, and general member educational sessions for the benefit of the UC Berkeley and Haas communities.



## Corporate Sponsors for the Berkeley Investment Conference '18:

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### What Will You Do?

#### ***Learn About Investing:***

Teams will learn about investing from the perspective of professionals working at elite firms. Moreover, by interacting with fellow peers, participants will expand their viewpoints and develop their investing skills.

#### ***Work Together:***

During the idea generation process, teams are encouraged to collaborate in order to develop comprehensive, strong, and compelling investment ideas.

#### ***Share Ideas:***

We provide a platform for teams to interact throughout the conference. Students are given the opportunity to present to an audience of passionate undergraduates as well as judges.

#### ***Expand your Skills:***

Through hearing our speakers, working together, and sharing ideas, participants will be able to expand their skills in various aspects of finance and improve on weaknesses not previously explored.



### ***How to Enter:***

For the preliminary round, teams submit a written investment memo of 2–3 pages to the email below. Teams that have been chosen to compete at the conference will receive an email invitation on March 9<sup>th</sup>, 2019. Each team must be comprised of three to five members.

Further details on hotel accommodations and travel will be available for teams outside of UC Berkeley. We will help participating teams reserve convenient and competitive accommodations. However, we will not fund transportation or accommodations.

### ***Eligibility and Pitch Guidelines:***

Each team will present a long or short thesis on a publicly traded company with a market capitalization of at least \$500 million. Pitches will be evaluated based on: the quality of the variant perception, fundamental analysis, valuation, and presentation. There is no specific format, but successful pitches should include a business overview, variant perception, and valuation.

### ***Timeline of the Conference:***

February 2<sup>nd</sup> – Applications for the conference will open on the website

March 2<sup>nd</sup> – Applications and registration for the conference closes

March 9<sup>th</sup> – Invitation emails and more information sent out to teams

April 13<sup>th</sup>-14<sup>th</sup> – Conference held at UC Berkeley

### ***Organizers and Contact:***

We look forward to a great competition! We will be continuously updating our website as more details are solidified.

Feel free to email us with any questions you may have:

General inquiries and applications: [berkeleyinvestmentconference@gmail.com](mailto:berkeleyinvestmentconference@gmail.com)

Please email other logistical inquiries to Sara, the BIC Conference Director  
[sara.knipa@berkeley.edu](mailto:sara.knipa@berkeley.edu)