



BERKELEY INVESTMENT CONFERENCE

Spring 2018 Berkeley Investment Conference Information Packet

Presented by Berkeley Investment Group

February 2018



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Challenge, connect and grow at the Berkeley Investment Conference

About Berkeley Investment Conference:

The Berkeley Investment Conference (“BIC”) is our inaugural annual national investment competition hosted at the UC Berkeley campus on March 16th-17th. The competition allows undergraduate students from around the nation to showcase their analytical talents, refine their investing skill-sets, expand their network and meet with people who share similar passions.

Teams of 3-5 members from across the nation will present their stock pitches in front of a judging panel of professional investors from some of the most innovative and elite buy-side funds for a chance to present their pitches in front of the entire conference audience as finalists to win the competition.

As a conference participant, you will have access to exclusive networking opportunities with sponsorship firms, have a chance to compete and win a \$1,000 prize money as a team, and listen to keynote speakers by industry experts!

Application will involve a brief summary of your team’s stock-pitch. Each team will pitch an equity, long or short. Selected stock must be over \$500M in market cap and be listed in the U.S. stock market, with an investment thesis explaining a market mispricing and detailed valuation for 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, the Berkeley Investment Group is a team of passionate investors at the University of California, Berkeley that aim to educate our campus community on value investing and deliver outsized returns to our partners. We are the largest and oldest student-run fund on the UC Berkeley campus and manage a fund of over \$130k in AUM. For the duration of over 20-years, BIG has created uncommon return for its partners and investors through a value-oriented investment strategy, and by attracting the most talented students into its internship program.



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What Will You Do?



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Learn About Investing:

Through keynote speakers from those who work in the financial industry, teams will learn about investing from the perspective of professionals in top firms in the Bay Area. Moreover, by interacting with fellow peers, participants will hear from different viewpoints and develop their investing skills.

Work Together:

During the stock pitch process, teams are encouraged to collaborate and develop comprehensive, strong, and compelling investment ideas to present to judges from elite buy-side firms.

Share Ideas:

We provide a platform for teams to share ideas throughout the conference and to present to an audience of undergraduate students passionate in investing. Furthermore, all teams will get the opportunity to watch finalists' presentations and present to the judges in their pods.

Expand your Skills:

Through keynote speeches, working together, and sharing ideas, participants will be able to expand their skills in various aspects of finance and improve on weaknesses not explored prior to pitching a stock.



How to Enter:

The preliminary round consists of a written investment memo of 2–3 pages, which will be submitted on the website or by email below. Teams that have been chosen to move on to the conference will receive an email invitation on February 26th, 2018. Each team must consist of no more than five members and at least three members.

Further instructions on hotel accommodations and travels will be available for teams outside of UC Berkeley if they are invited to the conference. While we will help participating teams reserve convenient and competitive accommodations, 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 quality of variant perception, fundamental analysis, valuation, and presentation. There is no specific format, but successful pitches should include some element of business overview, variant perception, and valuation.

Timeline of the Conference:

February 5th – Applications for the conference will open on the website
February 23rd – Applications and registration for the conference closes
March 2nd – Invitation emails and more information sent out to teams
March 16th – Conference held at UC Berkeley

Organizers and Contact:

We look forward to a great competition! We will constantly have updates to the conference on our website, which will be live soon.

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

General inquiries and applications: berkeleyinvestmentconference@gmail.com

Please email other logistical inquiries to the BIC Conference Directors Sean and Amy:
seanjaelee@berkeley.edu or amyran@berkeley.edu