CAMBRIDGE
STUDENT INVESTMENT FUND

Portfolio Management Guidelines

Sector Heads & Analysts

Cambridge Student Investment Fund

Investment Specifications

Portfolio

- A maximum of 5 positions can be held at any one time.

- A minimum of 1 position is required at any one time.

- The nominal value of any position may not exceed 25% of the total portfolio value at the time of investing.

- Teams may only invest in stocks within their sector.

- The portfolio will be denominated in Great British Pounds.

Trading

- Long and short positions may be held.

- Trades will be executed on the closing price of the day the trade is submitted.

- Positions can only be entered during term time. During holidays, positions can only be closed.

- Teams are expected to make at least 2 entries throughout the term time.

- Teams will be required to submit stop-loss trades for each trade at the time of submission.

- Teams can opt into foreign exchange rate hedging, where the position will close at the exchange rate at which the position was opened.

- Trades will be submitted using the **Portfolio Adjustment Template** attached below.

Investment Scope

- Positions may be held in equities which meet the minimum £100m market capitalization requirement within the exchanges of the following countries:
  - United Kingdom
  - United States
  - Germany
  - China
  - France
  - Hong Kong
  - India
  - Australia

Cambridge Student Investment Fund

Portfolio Adjustment Report

Sector Team: [Your input here]

Sector Head: [Your input here]

Lead Analysts: [Your input here]

Recommendation: **Short** □ **Long** □

Allocation: [Your input here]

Price Target: [Your input here]

Time Horizon: [Your input here]

Type of Investment:

Growth □	Value □	Special Situations □
Macro □	Company Events □	Theme □
Other, please specify:		[N/A]

Investment Thesis:
[Your input here]

Stock Info:

Position Size (LCY)	[Your input here]
Stock Ticker	[Your input here]
Stock Exchange	[Your input here]
Currency	[Your input here]
Currency Hedged?	**Yes** ☐ **No** ☐
Market Cap (LCY)	[Your input here]
52-week range (LCY)	[Your input here]
Stop Loss Price (LCY)	[Your input here]

Catalysts

[250-500 words]

Risks

[250-500 words]

Portfolio Considerations

[250-500 words]

Additional Comments