

FINAN 6800: MSIF

09/15/2025

Team 4 Risketeers: Gabriela Mostacero, Jaxon Floyd, Nicole Matamoros, Xiaobo Gong

Pitch Topic: Investment Parameters Proposal

Grade: 85% (47.17 / 55.50 pts)

TA Feedback

Strengths

Your team was professional and succinct. Each individual essentially presented one slide and structuring it in this way allowed you to field questions effectively.

You also did a good job redirecting some questions to other aspects of your analysis (e.g. using questions about target beta as a lead-in to other risk-adjusted ratios).

While we ultimately were unable to include certain aspects of your proposal due to the constitutional constraints of the Fund, you did well to think creatively about how the content of your pitch would translate into real life process adjustments.

Areas for Improvement

Remember to be very specific when offering anything up for a vote. If anything you pitch requires additional implementation, that process needs to be laid out clearly.

As was pointed out in class, prior performance/parameters still need to be justified if we expect them to continue in the future. Externalities can vary widely across even short, sub year time horizons.

While the overall concise nature of your pitch was fantastic, it also makes it that much more crucial to be intimately familiar with any individual line item you choose to include in the slides. There were a couple risk metrics mentioned today that you seemed to be a little unclear about in terms of how they are calculated. It's an understandable challenge but something you still want to try to be sharp about.

Do not bring phones/laptops/iPads/pages of notes up with you while presenting, use a couple of 3.5x5 note cards, unless Dr. Brogaard says otherwise. Remember to speak and make eye contact with the audience, not the TV.

Overall, you did a solid job and we are excited to see more pitches from your team.