



INVESTA

INSIGHTS



Corporate Package 2023/2024



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Land Acknowledgment

Across our chapters, we acknowledge that the land we study, work, play, and learn on is the traditional territory of the Indigenous peoples including the territories of the:

Musqueam



Anishnaabe



Seneca



Chonnonton



Huron-Wendat



Lūnaapéewak



Haudenosaunee



Neutral



Mississauga



Algonquin



They have stewarded this land for generations and through our actions, may we foster respect, collaboration, and harmony as we move forward, acknowledging the past while we work towards building a brighter, shared future.

A Letter From Our Co-Presidents



Dear Potential Partner,

We hope this letter finds you well! On behalf of the Investa Insights Executive Team, we would like to extend our warmest greetings to you and our sincerest welcome to our 2023/2024 year. This year, we plan to host our inaugural Stock Pitch Competition which we believe will not only be an opportunity for students to showcase their passion and potential but also a channel to connect the leaders of tomorrow with current industry professionals.

Founded in 2019, Investa Insights is an intercollegiate finance club aimed at bridging the North American finance community. To date, Investa Insights is the fastest-growing intercollegiate finance organization in Canada, expanding to 11 chapters and 100+ members. Over the past three years, the Club has made firm progress in delivering value to students through chapter-wide educational presentations; this year, we are determined to elevate this experience by uniting all the chapters in engaging and valuable events.

Investa Insights would be thrilled to partner with you to make this year even more meaningful, impactful, and memorable. Please find all relevant information pertaining to the event and sponsorship details/offerings in this package.

If you have any further inquiries, please do not hesitate to reach out to Ali Movasaghi or Jonathan Wang via email at jonathan.wang@investainsights.com. To learn more about Investa Insights and our past deliverables, please visit our website at www.investainsights.com/

Once again, on behalf of our entire 2023/2024 Executive Team, we thank you for your time and consideration, and we look forward to working together this year to meet your firm's goals by creating memorable experiences.

Kind Regards,



Ali Movasaghi
Co-President



Sarah Peng
Co-President



Isaac Dong
Co-President



About Us



Since our founding, we have built a strong foundation of bright and motivated analysts across some of the top business schools in the country. As we welcome our newest chapter at TMU, we look towards new opportunities for growth which is why we are thrilled to announce that this year we will be hosting our inaugural Stock

Pitch Competition. Throughout the years, our analysts have worked diligently to learn and improve their skills by producing a wide selection of industry-standard deliverables such as stock pitches, industry reports, and transaction analysis which can be viewed through our website at investainsights.com. Our goal at Investa has always been to bridge the intercollegiate gap because we believe that true learning is a collaborative process through which we can reach our fullest potential.



Our Commitment to Diversity and Inclusion

At Investa, Equity, Diversity, Inclusion, and Indigeneity (E.D.I.I.) is at the forefront of what we do. By fostering an atmosphere of respect and open-mindedness, we aim to ensure that everyone feels comfortable expressing their ideas and insights.

Investa is making commitments towards Equity, Diversity, Inclusion, and Indigeneity by:

- Annually hosting our Diversity in Finance event to empower students from all backgrounds
- Prioritizing inclusive hiring practices throughout our application process
- Pursuing partnerships with firms that have strong E.D.I.I. values
- Ensuring diversity of background on competition judging panels

At Investa we understand that a commitment to E.D.I.I. is not a destination but an ongoing process that requires continued learning and re-evaluation. If you have any suggestions for how we can improve, we strongly encourage you to reach out so that we can work towards a more inclusive experience.

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The Stock Pitch Competition

This year we are ready to announce our inaugural stock-pitch competition available to Investa members. Their analytical and communication skills as well as their financial mastery will be on full display for you to see.

Where?

Westin Harbor Castle,
Toronto

When?

25 November 2023
11 am – 5 pm



The Format

In teams of 5, competitors will prepare a 15 minute stock pitch and a 5-10 minute Q&A for a North American Equity above \$500 million market cap. There will be an initial preliminary stage which will be held virtually with the top 5 teams advancing to the in-person finals in Toronto.



Caliber of Analysts

With a selective application process (6% acceptance rate) and eleven chapters across Canada, our analysts can pride themselves as being some of the top business students in the country. In 2022, our analysts have secured positions at top banks and firms in North America:

| SELECT 2023 PLACEMENTS | | | | | | | | | | | | | | | | | |
|--|--|--|--------------------------------|--|--|-------------------------------------|--|--|---------------------------------|--|-----------------------------------|---------------------------------------|---------------------------------------|----------------------------------|----------------------------|---------------------------|--|
| agentis CAPITAL Investment Banking | agentis CAPITAL Investment Banking | Allvista Equity Research | AVIVA Corporate Development | BANK OF AMERICA Corporate Banking | barometer Investment Management | BARRAN'AGH Investment Management | BAY STREET Investment Management | BCI Private Equity | BCI Public Markets | BDO Infra & Renewables | BMO M&A | BMO Private Wealth | BMO Asset Management | BMO Investment Banking | BMO Investment Banking | BMO Investment Banking | |
| BMO BMO Capital Markets Investment Banking | BMO BMO Capital Markets Financial Governance | BMO BMO Capital Markets Investment Banking | BCG Consulting | Brookfield Asset Management | Brookfield Asset Management | BURGUNDY Investment Management | CG/Canaconcord Genunity | CG/Canaconcord Genunity | CG/Canaconcord Genunity | CapitalOne Credit | Catalyst Equity Research | CIBC Investment Banking | CIBC Investment Banking | CIBC Investment Banking | CIBC Investment Banking | | |
| CIBC Corporate Banking | CIBC Investment Banking | citi Investment Banking | citi Investment Banking | CloudStreet PARTNERS Investment Management | CPP investments Investment Management | Deloitte Risk Advisory | Empire Life Investment Management | EVERCORE Investment Management | Greenhill Investment Banking | KPMG Consulting | Manulife Investment Management | Morgan Stanley Sales & Trading | MUFG Credit Risk | | | | |
| NATIONAL BANK Investment Banking | NATIONAL BANK Investment Banking | NATIONAL BANK Investment Banking | NOMURA Investment Banking | NOVACAP Private Equity | ORIGIN Investment Banking | ORIGIN Investment Banking | ONTARIO TEACHERS' PENSION FUND Investment Management | ONTARIO TEACHERS' PENSION FUND Infra & Natural Resources | PARADIGM Equity Research | PILLARS CAPITAL Investment Management | Point72 Natural Resources | PSP Investments Investment Banking | PJF Investment Banking | RBC Global Credit | | | |
| RBC Global Markets | Scotiabank Wealth Management | Scotiabank Investment Banking | Scotiabank Sales & Trading | Scotiabank Sales & Trading | Scotiabank Investment Banking | Scotiabank Sales & Trading | TD Investment Banking | TD Investment Banking | TD Global Markets | TD Global Markets | TD Investment Banking | TURTLE GREEK Investment Management | TURTLE GREEK Investment Management | ULYSSES Investment Management | | | |



Analyst Application Process

At Investa, we uphold a rigorous and selective analyst application method to ensure that we bring the brightest and most motivated individuals into our team. Our application process is designed to identify exceptional candidates who possess a deep understanding of finance, a strong analytical mindset, and a willingness to learn and develop.

Resume Drop

An initial screening process where applicants are evaluated based on experiences and academic achievement.

First Round Interview

A technical and behavioural interview where applicants have a chance to demonstrate their understanding and mindset.

Second Round Stock Pitch

Applicants choose from a pool of companies and have 10 days to prepare a stock pitch. Presentations are reviewed and the top candidates are selected to become analysts.



Why Sponsor us?

Through our partnership, your firm will have the opportunity to impress a pool of bright and highly motivated students. With access to top talent, your firm will be able to position itself as a leading employer by demonstrating a commitment to education and career development. We believe that such an impression will prove invaluable as students once again enter the recruitment process. Our premium package takes this a step further by providing the opportunity for representatives from your firm to network directly with our analysts in order to create lasting relationships.



Sponsorship Opportunities

Company Logo

Your firm will receive increased exposure by having your company logo displayed across our social media in a thank you post, on our website, on merchandise, and on banners and signs at the event. Logo size will depend on the sponsorship tier.

Resume Book

To make it easier to scout and reach out to candidates who would be a good match for your firm, you will receive a book containing the resume and contact information from all Investa members. The Finalists and the Analysts' Roles will be indicated.

Fireside Chat

Representative(s) from your firm will be invited to promote your company in a 30-minute virtual fireside chat + Q&A which will be showcased to all students across Investa's eleven chapters.

Coffee Chat Session

Connect with potential candidates through a two-hour drop-in coffee chat session open exclusively to Investa members. This is a great opportunity to develop strong relationships with high-quality candidates.

Virtual Workshop

An opportunity to demonstrate your firm's commitment to education and talent development by hosting a virtual workshop to help candidates prepare for the stock pitch competition.

TITLE Sponsor Exclusive Opportunities

Winner Dinner

With a 1:1 ratio of representatives to candidates, this is the perfect opportunity to build lasting relationships with the winning team of the stock pitch competition during dinner after the event.

Closing Speech

Leave off on a strong note by delivering a heartfelt closing speech. This is a chance to make any closing remarks and congratulate students on their achievements. Thus, your firm is able to demonstrate its commitment to the candidates.

Awards Host

Have your representatives host the awards ceremony to recognize the competitors who have gone above and beyond in their work. By making their night truly special, your firm will leave a lasting impression on candidates.

Photo Booth

A memorable event will be accompanied by cherished memories. Ensure that students remember the dedication of your firm by being present in their social media posts and photos. Customize the booth as you see fit to make it extra fun!

Event Venue

An opportunity to impress candidates with the prestige of working at your company by having the option of hosting the competition at your firm's office. This is optional, the event will be hosted at Westin Harbour if declined.



Partnership Levels

Title
\$5,000

The most prestigious tier. *There can only be one Title sponsor.* The competition will be hosted in your firm's name. Your firm will have the largest sized logos and will be invited to send five representatives to the event.

Platinum
\$1,500

The Platinum sponsorship tier offers your firm Platinum Level sized logos. Your firm will also be invited to send three representatives to the event. Platinum sponsorships are a way to establish your firm as an industry leader in talent development.

Diamond
\$1,000

The Diamond sponsorship tier offers your firm Diamond Level sized logos. Your firm will also be invited to send two representatives to the event. Diamond sponsorships allow for more personal communication with candidates.

Gold
\$500

The Gold sponsorship tier offers your firm Gold Level sized logos. Your firm will also be invited to send one representative to the event. Gold sponsorships are a great way to increase brand exposure.

| | Gold | Diamond | Platinum | Title |
|--|-------------|----------------|-----------------|--------------|
|--|-------------|----------------|-----------------|--------------|

of Representatives

1

2

3

5

Company Logo



Resume Drop



Fireside Chat



Coffee Chat Session



Virtual Workshop



Dinner with Comp. Winners



Closing Speech



Award Ceremony Host



Photo Booth



Event Venue





Alumni Testimonials



"What initially drew me to Investa was the intercollegiate aspect of the club – I was eager to work with students across Canada and hoped that the diversity in our experiences could challenge and further develop my existing knowledge on financial markets. Investa Insights offered a unique opportunity to meet students across Canada with a shared interest in finance. Receiving meaningful feedback from peers alongside the analyses we do at Investa taught me how to think more critically about thesis development and valuation. If you want to learn from students in all areas of finance, I highly encourage you to apply to Investa! I learned a tremendous amount this year and built lasting friendships!"

Shelly Qian

LionTree, Investment Banking Analyst



"I joined Investa Insights to meet new students interested in finance that was larger than just my on-campus and enjoyed the entrepreneurial experience of a rapidly growing club. Everyone in Investa Insights is extremely friendly and willing to help others out. Investa gave me the opportunity to research and talk about businesses in industries I had never covered before and to work with fellow students in learning to analyze investments and develop a broader professional skill set. I would highly recommend Investa to anyone interested in finance looking to build a network of like-minded peers across Canada."

Michael Duncan

Moelis, Investment Banking Analyst



"I joined Investa Insights to learn more about finance by working with talented students both at Queen's and abroad. I have benefited from learning alongside inspiring students at Queen's and other universities, while having an opportunity to do thorough research and teach others through the deliverables we create. I have also enjoyed taking part in the Q&A for various stock pitches, market research reports, and other deliverables after presentations. Groups do very thorough analysis and it is a great opportunity to ask questions and learn. My time on Investa Insights has been one of the highlights of my university career so far. For students that love collaboration and would like to pursue an interest in finance, I highly recommend you apply."

Jacob Levy

RBC, Investment Banking Analyst



"I joined Investa Insights to work alongside driven, like-minded students across Canada. Investa Insights was a great way to collaborate with students nationwide and gain new perspectives from a supportive and educational community. The best part of being on Investa Insights was presenting stock pitches, market research reports, and transaction analyses while learning how to make high-quality, industry-standard deliverables. Investa Insights is an amazing opportunity to expand your network, technical skills, and set you up for landing a great internship in finance. I've had a wonderful experience at Investa Insights and I'm sure you will too."

Dina Sayed

Goldman Sachs, Power Trading Analyst



A big thank you to our current sponsors!



CITIZENTEA



Contact Information

We hope that this package helped you better understand our vision for Investa in 2023/2024. If you have any questions about partnership opportunities or would like more information, don't hesitate to reach out to us. On behalf of the entire Investa Executive Team, we thank you for your time and consideration, and we hope to hear from you soon!

in [linkedin.com/company/investainsights/](https://www.linkedin.com/company/investainsights/)

www.investainsights.com/

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