



University of Toronto  
Engineering Finance  
Association  
Information Session

September 12, 2019

# Agenda



Club Objective & History



Club Operations



Club Plan and Schedule



Conclusion; Q&A; Executive Introductions

# Club Objective and History



# Club Objective and History

- Founded in 2009 to give Engineering students more exposure to Finance
- Started with Professor Lawryshyn & 3 Engineering students
- Has grown to 60 invested members and just under \$15,000 CAD in cash and equity, 7 Executives and many more active Analysts
- Looking to expand even further!

## Objective

Provide an opportunity for students to study and understand various sectors of the market by engaging them in investing activities.



# What we learn at UTEFA



## **Financial Skills:**

- Investment Strategies
- Financial and Accounting Analysis
- Valuation Methodologies



## **Soft Skills:**

- Presentation Skills
- Resume Workshop
- Mock Interviews
- Networking Skills

# Leverage UTEFA to Build Your Network!



Morgan Stanley



# Club Operations

# We make stock pitches.

- Divide ourselves in different “sector groups” with each being led by an executive
- Sector groups analyze companies from both quantitative and qualitative perspectives
- Sector groups create stock pitches and present them at the weekly General Meetings
- UTEFA shareholders vote to buy/sell shares
- VP Finance executes all trades during the following day’s market hours





# Weekly Market Update

VP Operations and Head Economist: oversee the club's portfolio and watches the market

- Weekly market updates highlights the week's major news events – **contact Matteo/Talal if you are interested in joining the Market Update Committee!**
- Market Update Committee monitors current holdings and provide suggestions with justifications
- Market Update Committee also highlights future investment opportunities



# Learning Sessions

UTEFA will have 3 weeks of 1-hour learning sessions

## Session 1

- Introduction to finance and financial systems
- Introduction to key financial concepts

## Session 2

- Key accounting basics
- Valuation methodologies (relative vs. intrinsic)
- Public Company Comparables

## Session 3

- **Live** Discounted Cash Flow (DCF) Analysis



# What is typical meeting like?

- General Meetings occur **every Thursday**, starting October 10<sup>th</sup>, 2019 (i.e. immediately after the completion of the training sessions)
- General Meetings will **begin at 6:10pm** (allows more time for students currently on PEY to attend) and will end around 7:00pm

## Typical General Meeting Agenda:

- ~ 5 minutes: Market Update by the Market Update Committee
- ~ 10 minutes: Discussion of market news, current market trends, follow-up from past meetings
- 30 minutes: Presentations by sector groups, Q/A, discussion
- ~ 5 minutes: Discussion of upcoming responsibilities for future weeks



# Club Plans and Schedule



Session	Date	Time	Room	Agenda
1	TODAY	<b>6:30pm</b>	GB 119	Information Session
2	Sep 19	6:30pm	GB 119	Learning Session – Intro to Finance
3	Sep 26	6:30pm	GB 119	Learning Session – Intro to Accounting & Valuations
4	Oct 3	6:30pm	GB 119	Learning Session – Live DCF
5	Oct 10	6:30pm	GB 119	General Meeting & Exec sample pitch
6	Oct 17	6:30pm	GB 119	General Meeting
7	Oct 24	6:30pm	GB 119	General Meeting
8	Oct 31	6:30pm	GB119	General Meeting
9	Nov 7	6:30pm	TBD	General Meeting
10	Nov 14	6:30pm	TBD	General Meeting
11	Nov 21	6:30pm	TBD	General Meeting
12	Nov 28	6:30pm	TBD	Alumni Pub Night
13	Dec 5	6:30pm	TBD	General Meeting

# Becoming an Invested Member

- Formal invitation to become a UTEFA shareholder will be sent out mid to late October
- UTEFA shareholders will have voting rights for all investment decisions
- Contact Michael Travis (VP Finance) to learn more!



# Additional Plans for the Year

Aside from the General Meetings, UTEFA is looking to create various fun activities throughout the year – more details will be provided via e-mail and during General Meetings.

Current ideas:

- Resume Workshops
- Mock Interviews
- Networking Events / Career Night
- Alumni Pub Night
- Stock Pitch Competition
- You name it...



# Meet Our Execs!



**Prof. Lawryshyn**  
Club Advisor



**Tiger Sheng**  
President



**Michael Travis**  
VP Finance



**Diana Escoboza**  
VP  
Communications



**Matteo  
Ciserani**  
VP Operations



**Julian Zhang**  
VP Technology



**Talal Fahoum**  
Head  
Economist



**Matthew Byra**  
Head Analyst





Thank you for coming out to the Information Session!

Our first Learning Session will be held on:

**Thursday, September 19<sup>th</sup> at 6:30pm in GB 119**

Please fill out the sign-up form before you leave so we can add you to our mailing list!

**Stay in touch:**

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