

# GBM #7: Asset Management

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October 23rd, 2024



WHAT IS **AN ASSET?**

**BROADLY, AN ASSET IS ANYTHING  
THAT CAN BE HELD OR MANAGED  
TO MAINTAIN OR GAIN VALUE**



# TYPES OF ASSETS

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## Physical

### Real Estate

- Residential
- Commercial



### Commodities

- Precious Metals
- Agricultural
- Timber
- Energy



### Collectibles

- Art
- Coins & Stamps
- Wine



## Financial

### Stocks

- Geography
- Capitalization
- Style



### Bonds

- Sovereign
- Corporate
- Municipal
- Mortgage and Asset Backed



### Investment Vehicles

- Mutual funds
- ETFs
- SMAS



# WHAT'S THE DIFFERENCE BETWEEN STOCKS AND BONDS?

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**Stocks**—Shares of individual companies

A company issues stock—selling a piece of itself in exchange for cash.

When owning a stock, you become part owner of the company.

This is why stock is also referred to as equity. Stock owners benefit if company performs well and its value increases over time.

**Bonds**—Debt issued by entities

An entity issues a bond—issuing debt with the agreement to pay interest for use of money.

When owning a bond, you are lending money to a government, corporation, or other entity that borrows money and pays interest on the loan.

Each bond has a certain par value (say, \$1000) and pays a coupon to investors.



# ASSET CLASSES

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Asset Class	Defined	Risk Level
<b>Equity (stocks)</b>	Equities represent ownership in a company and are traded on stock exchanges	High risk, high return, short-term price volatility
<b>Fixed Income (Bonds)</b>	Fixed income securities, such as government bonds, corporate bonds, and municipal bonds, represent debt issued by governments or corporations	Medium to low risk, relatively stable price volatility. However, bonds lose value, particularly in a rising interest rate environment
<b>Cash and its Equivalents</b>	Are the most liquid assets on a company's balance sheet. For a corporation, it could include any cash and similar items that are used for short-term financing needs	Extremely low risk, stable prices, but low returns
<b>Real Estate</b>	Real estate investments include physical properties such as residential, commercial, or industrial real estate	Vary depending on factors such as location, market conditions, and property management



# WHAT IS ASSET MANAGEMENT?

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Asset management refers to the professional management of investments, such as stocks, bonds, real estate, and other financial assets, on behalf of individuals, institutions, or organizations

## Why Manage Assets?



**Investment  
Diversification**



**Risk  
Management**



**Long-Term  
Wealth  
Accumulation**



**Market  
Efficiency**



**Professional  
Expertise**





# WHAT DO ASSET MANAGERS DO?

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Asset management involves developing, maintaining, optimizing, and selling assets. Individuals, companies, or countries can manage their assets, or enlist various asset management firms to control their assets

## Why Manage Assets



When properly managed, assets can contribute to financial growth and long-term stability by mitigating year-to-year financial insecurity





# WHAT I DID FOR AMERAUDI ASSET MANAGEMENT





# WHAT I DID FOR AMERAUDI ASSET MANAGEMENT

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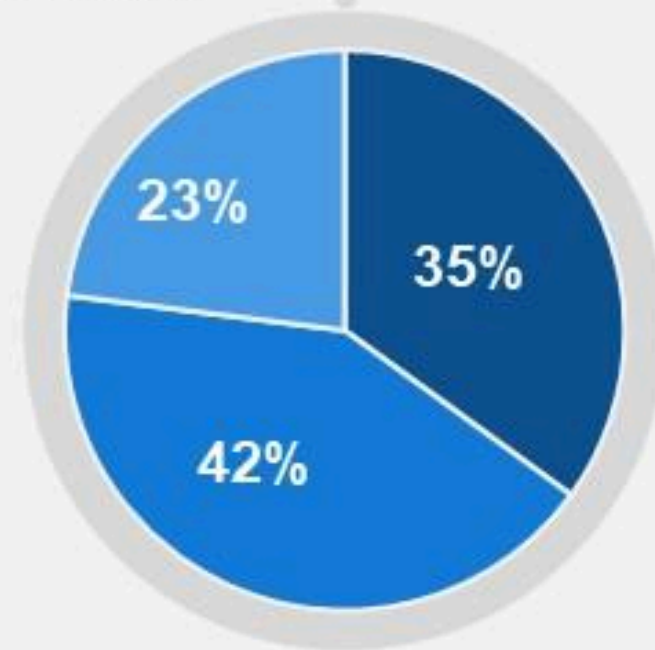
- COMPARE PORTFOLIO MODELS
- EQUITY RESEARCH
- FIX ASSET ALLOCATIONS
- GET COFFEE FOR THE ASSET MANAGERS...



# WHAT I DID FOR AMERAUDI ASSET MANAGEMENT

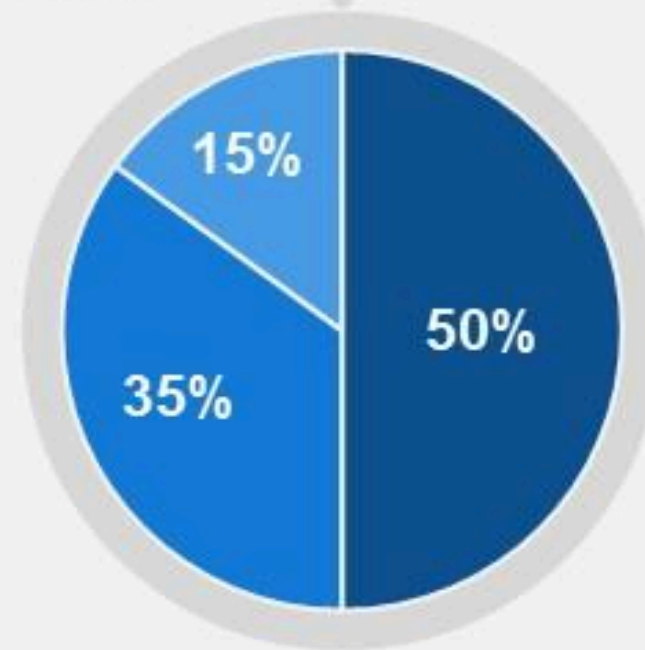
## Investment Portfolio Pie Charts Showing Stocks...

**Conservative Portfolio**  
*This slide is 100% editable. Adapt it to your needs and capture your audience's attention.*



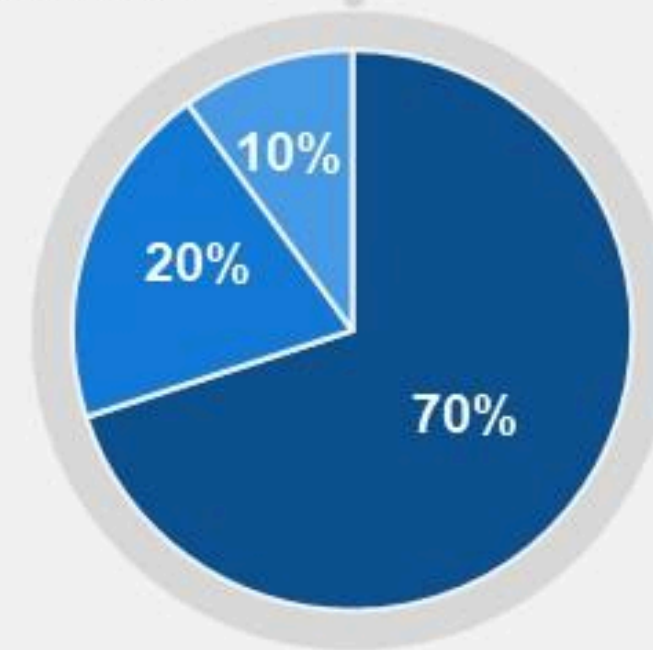
■ Stock ■ Bond ■ Cash

**Moderate Portfolio**  
*This slide is 100% editable. Adapt it to your needs and capture your audience's attention.*



■ Stock ■ Bond ■ Cash

**Aggressive Portfolio**  
*This slide is 100% editable. Adapt it to your needs and capture your audience's attention.*



■ Stock ■ Bond ■ Cash



# RECRUITMENT PROCESS

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**Target Candidates:** Business Majors:

- Finance, Economics, Accounting, and related fields.

## Recruitment Timeline

- Current Phase (October - November)
- Internship and full-time recruitment is open for 2025 roles.
- Most positions will close by end of November

## What to know for interviews

- Portfolio Management Concepts: Expect questions on risk-return trade-offs, portfolio diversification, asset allocation, and financial instruments (stocks, bonds, derivatives).
- Market Analysis: Be prepared to discuss macroeconomic factors, industry trends, and how they impact asset valuation and portfolio strategies.
- Investment Strategies: Know different investment styles (value, growth, active vs. passive) and how these are applied in managing institutional or retail portfolios.





# SOME TYPICAL SALARIES

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## **Investments (Portfolio Management, Research, Trading):**

- Starting salary: \$80-120k in NYC
- Bonus: 20-50% of base salary

## **Distributions (Sales, Marketing, Investor Relations):**

- Starting salary: \$60-90k in NYC
- Bonus: 10-30% of base salary

## **Shared Services (Operations, Risk, IT):**

- Starting salary: \$70-100k in NYC
- Bonus: 5-20%



# Thank you!

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**Attendance**

**New Website coming soon...**

**Discord**

