

Fordham NYSSA Competition & CFA Research Challenge

Outline of Process for Team Selection

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Thank you for your interest in the Fordham NYSSA CFA Investment Research Challenge. The investment research competition sponsored by the New York Society of Security Analysts is divided into two phases:

- 1) The first phase involves participation in:
 - a. Three seminars which will address the preparation of an Initiating Coverage along with supporting materials.
 - b. While attending seminars you will apply to participate in the initial selection process, which will include drafting a report of one of three selected companies and deliver a presentation. Team selection commences immediately following.

- 2) The second phase of the competition begins in late October and is a research report writing/defending contest involving investment research teams from sixteen New York area universities.

Detailed Process and Dates to Live By!

Each candidate will be required to submit a short email on why they want to join the challenge along with a Resume. Once submitted and receipt is confirmed, the candidate can then begin working on research. There will be three companies to select from for your personal analysis.

In addition to writing a short analyst report that will be submitted, candidates will be required to deliver a presentation that will be a summary of the results given in the report. This presentation will be no longer than 10 minutes with five minutes for Q&A from both the Analyst and Managing Professor. Once all presentations are complete, team selection will begin immediately in the following days. Five team members will be selected and the usual size of the candidate pool is approximately 30, so it is competitive. Best of luck!

Date Due	Time Due	Materials Due/Meeting	Location
September 12 th & September 13 th	6PM 8PM	Initial Phase Kick-Off Meeting Initial Phase Kick-Off Meeting	McMahon 109
September 27 th	6:30- 7:30PM	Financial Ratio's Seminar	TBD
September 30 th	6PM	Submission of Letter and Resume for entry into selection process due.	Email to r.fuest@landorfuest.com
October 5 th	6:30- 7:30PM	Market & Competitor Analysis Seminar (Comparables)	TBD
October 6 th	7-8PM	Presentation Delivery Skills	TBD
October 12 th	8PM	Research Papers Due	Templates will be distributed along with past examples.
October 18 th – 19 th	7PM- 9:30PM	Presentation Delivery for Team Selection.	TBD