

SSIF Newsletter



CFA Research Challenge

The CFA Institute Research Challenge is an annual competition that provides university students with hands-on mentoring and intensive training in financial analysis. This is the second year the SSIF will represent SIU in the CFA research challenge. The preliminary competition will take place in St Louis and the National competition will take place in Seattle. The 2016-2017 CFA research team members are Aaron Goeckner, Jace Munselle, Courtney Lucas, Anthony Reed, and Sam Drever. When asked about the challenge, Courtney Lucas stated “I’m really excited to start on this journey and I know our team can win it.”



SSIF and GSIF members collaborating on the different sector units within the investment fund.

COBA Challenge

The CoBA challenge is an intensive stock analysis competition in which three teams consisting of three members of the SSIF work to identify the best stock purchase from a randomly selected sector of the Russel 1000 index.

These teams also work to conduct the best sell recommendation from the already existing CoBA portfolio: all within the span of three days. On the day of the presentation, October 3rd, the teams each conducted a 10-minute buy/sell presentation, followed by a 10-minute Q&A session. At the end of the sell and the buy recommendations, spectators attending the challenge determine the winners by majority vote. The team with the winning buy recommendation has the honor of having their names displayed in the Bloomberg room. This year the winners for both the buy and sell portions were Aaron Goekner, Nathan Ray, and Sam Drever.



Fall 2016 COBA Challenge Participants

From left to right: Travis Rotheisser, Bennet Cohen, Sam Berger, Karla Rosado, Matt Laroocca, Josh Davis, Sam Drever, Aaron Goekner, and Sam Drever

Recent Fund Activity

For the Fall 2016 semester, the SSIF admitted 16 new members after interviewing 32 applicants. The GSIF admitted 7 new members. The funds are happy to welcome these new analysts who have agreed to dedicate significant amounts of time outside of class to further their education. The funds work tirelessly on behalf of the client, the SIU Foundation, in order to deliver the best results. As part of the experience, the funds participated in company visits to Corrections Corporation of America and NISA. The 6th CoBA and the SSIF's second participation in the CFA challenge are further opportunities for members to showcase their commitment and gain experience.

Senior Spotlight

Nathan Ray

Major? Finance

When did you join the fund? January 2013

What did you enjoy most about your experience?

Being a part of a team that encourages one another to learn the most they can.

Where are you heading after graduation?

Headed to Kansas City, trying to not be unemployed.

Josh Davis

Major? Accounting

When did you join the fund? January 2015

What did you enjoy most about your experience?

Gaining the knowledge I need to prepare for the professional world of finance.

Where are you heading after graduation?

To work in advisory practice of Deloitte in St. Louis.

The SSIF Welcomes Dr. Tim Marlo



With the departure of Dr. Jason Greene in June, the SSIF and GSIF welcome Dr. Timothy Marlo as a new faculty co-advisor. Dr. Marlo is an SIU alum and a former member of the SSIF back in 2000 and 2001. When asked to comment on his time in the SSIF, Dr. Marlo stated, “While it was much additional work on top of my classes, I absolutely loved my time as a member of SSIF. We were a much smaller group, and it has been fantastic to see the expansion of the group and see the room full of students.” The fund is excited to work with Dr. Marlo. Dr. Marlo expressed his feelings regarding his return, “First and foremost, I am excited to be advising such a great, well-respected group of students. The legacy and impact this group has both on- and off-campus is so impressive! I was never more in tune with day-to-day market news as when I was in SSIF, and I am excited to be back!”

As of December 31, 2016

	Qtr	Fiscal YTD	1-Yr	3-Yr	5-Yr	7-Yr	10-Yr	Since Inception
SSIF	8.41%	10.58%	18.68%	9.15%	15.87%	16.22%	10.45%	8.32%
S&P 400 Benchmark*	7.42%	11.87%	20.74%	9.04%	15.33%	14.24%	9.16%	9.32%
Difference	<i>0.99%</i>	<i>-1.29%</i>	<i>-2.05%</i>	<i>0.11%</i>	<i>0.54%</i>	<i>1.98%</i>	<i>1.29%</i>	<i>-0.99%</i>
Tracking Error**			2.98%	3.21%	2.90%	2.97%	3.90%	5.31%