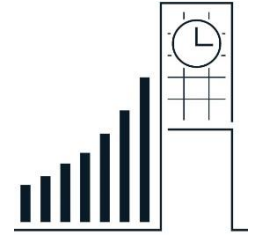


# EQUITY RESEARCH COMPETITION KICKOFF

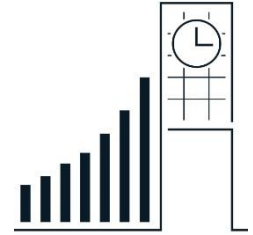
SPRING 2024

# EQUITY RESEARCH KICKOFF

## AGENDA



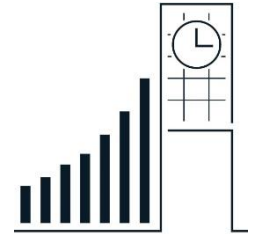
- ▶ Overview
- ▶ Why should I participate?
- ▶ Timeline and commitment
- ▶ Resources
- ▶ Getting started
- ▶ Next steps



# OVERVIEW

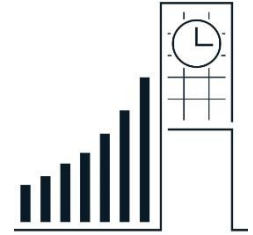
- ▶ Equity Research / Stock Pitch hybrid
  - Create a coherent investment thesis
- ▶ Teams of two or three people
  - Organize teams by **Thursday, February 8<sup>th</sup> at 11:59 PM**
- ▶ Rules:
  - U.S. listed publicly traded companies only
  - Market capitalization between \$1bn and \$100bn
  - No OTC stocks or ADRs
  - **No duplicate stocks**, please submit your company by **Thursday, February 22<sup>nd</sup> at 11:59 PM** [here](#)

# MASTER SCHEDULE

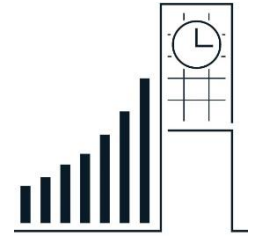


Date	Time	Room	Event
Monday, January 22	6:30 PM	G019	GIM
Thursday, January 25	6:30 PM	G021	GIM
Monday, January 29	6:30 PM	G019	Careers in finance, resources, recruiting process, and networking
Thursday, February 1	6:30 PM	G021	Equity research kick off
Monday, February 5	6:30 PM	G019	Equity markets overview / qualitative aspects of investing
Thursday, February 8	6:30 PM	G021	Macroeconomic overview and industry overview / How to pick a stock / qualitative analysis of a business
Monday, February 12	6:30 PM	G019	Basic Finance (TVM, EV vs Equity Value)
Thursday, February 15	6:30 PM	G021	Accounting 1
Monday, February 19	6:30 PM	G019	Accounting 2
Thursday, February 22	6:30 PM	G021	Revenue Build / Help Session
Monday, February 26	6:30 PM		Tentative: Ronnie Sanon Stock Pitch 101 Speaker Series
Thursday, February 29	6:30 PM	G021	DCF Valuation

# WHY SHOULD I PARTICIPATE?



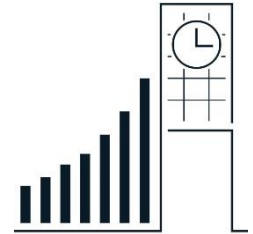
- ▶ Professional experience outside the classroom
- ▶ Develop valuable skills
  - Analysis and valuation
  - Presentation and communication
- ▶ Network
  - Executive Board, faculty and professionals
  - Opportunity to present final round in front of equity research professionals
- ▶ Polished finished product
  - Useful resume item when networking and interviewing



# TIMELINE AND RESOURCES

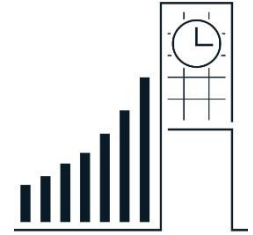
- ▶ Equity Markets Overview
  - **Monday, February 5<sup>th</sup> at 7:00 PM in AA G019**
- ▶ Later workshops to be announced
  - Qualitative business overview
  - Intrinsic and relative valuation
  - Presentation and report writing skills
- ▶ Other recommended resources and materials
  - Investopedia industry articles/primers
  - Valuation reference materials (Wall Street Prep)
  - Finance Society website – [bingfinance.org](http://bingfinance.org)
- ▶ Final round on April 26<sup>th</sup>, 2024 in NYC\*

# GETTING STARTED



- ▶ Industry and equity research reports
  - [S&P NetAdvantage](#)
  - [Thomson One](#)
  - [Morningstar](#)
  - [Business Insights](#)
  - Bloomberg terminal
- ▶ Screening for companies
  - [Finviz](#)
  - [Macrotrends](#)
  - Yahoo Finance/Google Finance

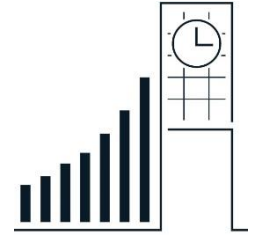
# NEXT STEPS



- ▶ Teams by **Thursday, February 8<sup>th</sup> at 11:59 PM**
  - If you have a complete team or two members and would like to add a third, sign up [here](#)
  - If you are a free agent, sign up [here](#)
- ▶ Look into industries that interest you
  - S&P NetAdvantage has great industry reports
- ▶ First workshop will cover equity markets and qualitative aspects of investing on **Monday, February 5<sup>th</sup> at 6:30 PM in AA G019**



# QUESTIONS?



- ▶ Check out our website: [bingfinance.org](http://bingfinance.org)
- ▶ Email us at:
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- ▶ **VP of Education:** Roman Charan
  - [rcharan1@binghamton.edu](mailto:rcharan1@binghamton.edu)