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Student portfolio winners

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Fifty teams of students who learn about investment strategy while managing real money put those strategies to the test in the University of Dayton's 10th annual student portfolio competition.

Nine student-managed investment funds were honored in the competition, held in conjunction with the RISE X Global Investment Forum March 18-20 sponsored by the University of Dayton in association with the United Nations Global Compact.

"The student-managed portfolios remain competitive in a very difficult market, which reflects the tremendous learning opportunities these students are receiving," said David Sauer, director of the University of Dayton's Davis Center for Portfolio Management and managing director of the RISE forum. "The importance of a disciplined investment strategy and approach are essential in this environment, and the student teams are successful. A thorough analysis of all potential portfolio holdings is essential."

Student-managed investment programs are a growing trend in finance education. More than 200 programs nationwide allow students to make investment decisions with real portfolios that are sometimes part of a university's endowment.

Although University of Dayton's team does not enter the competition because of the University's sponsorship, students through the University's Davis Center for Portfolio Management have responsibility for managing $11 million of the University's endowment.

The competition selects winners based on their risk-adjusted performance for calendar year 2009 in various categories for undergraduate and graduate portfolios.

For the fifth consecutive year, the University of Iowa's Henry Fund took top honors in a graduate category.

Winners in the undergraduate division are:

- Stetson University, DeLand, Fla.: fixed-style portfolio
- Henderson State University, Arkadelphia, Ark.: hybrid-style portfolio.
- University of North Dakota, Grand Forks, N.D.: growth-style portfolio.
- Anderson University, Anderson, Ind.: core-style portfolio.

Winners in the graduate division are:

- Villanova University, Villanova, Pa.: hybrid-style portfolio
- Cleveland State University, Cleveland: growth-style portfolio.
- HEC Montreal, Montreal: value-style portfolio.
- University of Iowa, Iowa City, Iowa: core-style portfolio.

RISE X (Redefining Investment Strategy Education) attracted students, faculty and professionals to hear discussions of global economic trends and investments from different perspectives. The three-day event is organized around panel discussions that give students opportunities to interact with leading thinkers in economics and finance. Visit http://udrise.udayton.edu.

Participants also weighed in on the first RISE student opinion poll. Almost half said the federal budget deficit was the No. 1 problem facing the U.S., while 30 percent said they thought it unlikely or somewhat unlikely that they would find jobs in their chosen career field. For more on the poll and complete results, visit http://www.udayton.edu/news/articles/2010/03/RISE_poll_results.php.

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