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# University of Dayton, Ohio (url: <http://www.udayton.edu/index.php>)



## Winning Portfolios

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While managing real money in real investment portfolios, winners of the University of Dayton's ninth annual student portfolio competition learned valuable lessons while navigating a historic economic time.

Eight student-managed investment funds were honored in the competition, which was held in conjunction with UD's RISE IX Global Student Investment Forum March 26-28.

"A year like 2008 offers students in applied investment programs an incredible learning experience to connect what they learn in the classroom with the realities of global markets," said David Sauer, director of the Davis Center for Portfolio Management and managing director of the RISE Forum.

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.

For the fourth consecutive year, the University of Iowa's Henry Fund took top honors in a graduate category, said Todd Hugel, assistant finance professor at the University of Iowa.

"Witnessing firsthand such a severe economic and market downturn over the last year has definitely influenced our perception of risk and the market in general," Hugel said. "I believe our analysts have become more critical of historical performance and caused them to look with greater scrutiny at corporate financial statements. In general, I believe that students are more attuned to economic data than ever before because the health of the global economy directly impacts the strength of the job market."

Finance professor David Nawrocki, who guides Villanova University's student portfolio program, said he expects the long-term investment attitudes of finance students who were involved in such programs during the past year will move back to the basics of learning about the financial flow of funds, tracing all cash flows within a firm and maintaining prudent leverage ratios.

"I think they're going to have to find out that there is a tomorrow," Nawrocki said.

The competition selects winners based on their risk-adjusted performance for calendar year 2008 in various categories for undergraduate and graduate portfolios; 50 entries were submitted.

### Winners in the undergraduate division are:

- Marquette University, Milwaukee: fixed-income portfolio.
- Villanova University, Villanova, Pa.: growth-style portfolio.
- Bentley University, Waltham, Mass.: value-style portfolio.
- Concordia University, Montreal: core-style portfolio.

### Winners in the graduate division are:

- University of Nebraska-Omaha: fixed-income portfolio.
- University of Iowa, Iowa City, Iowa: growth-style portfolio.
- Northeastern University, Boston: value-style portfolio.
- HEC Montreal, Montreal: core-style portfolio.

RISE IX attracted more than 2,600 students, faculty and professionals from 275 colleges and universities from around the world.

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