

## Role Description Portfolio Manager

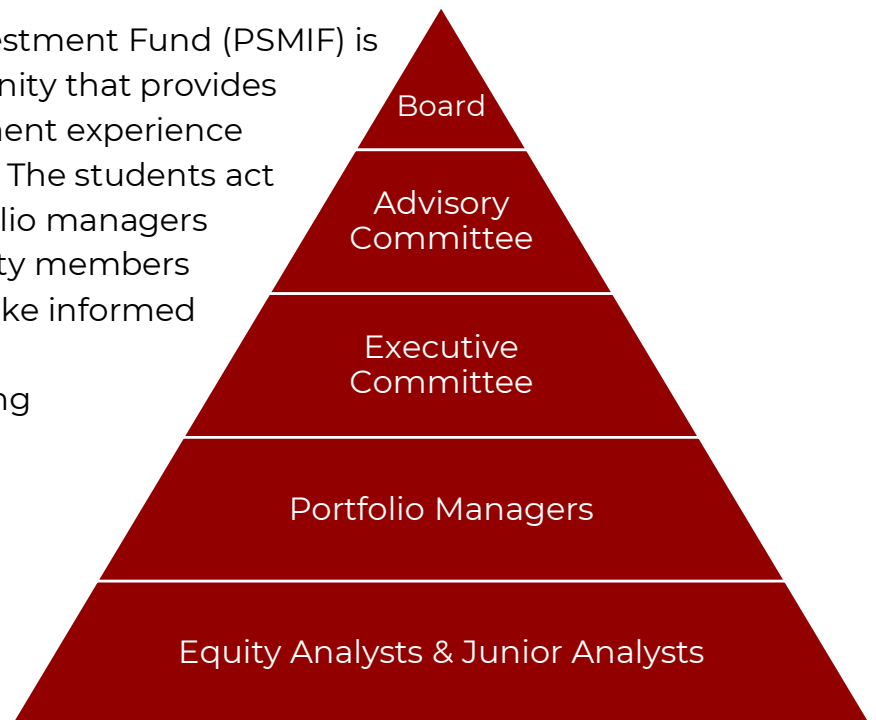
*Last updated: 10/02/2024*

### Fund Overview

The Price Student Managed Investment Fund (PSMIF) is an experiential learning opportunity that provides students with real world investment experience managing a portfolio of equities. The students act as the equity analysts and portfolio managers and receive guidance from faculty members and industry professionals to make informed investment decisions.

The organization has the following structure:

- Board of Directors (5)
- Advisory Committee (5-8)
- Executive Team\* (2)
- Portfolio Managers\* (5)
- Equity Analysts\* (8-12)
- Junior Analysts\* (2-5)



\*Student positions

### Portfolio Manager Role

Portfolio Managers (PM) will report to the Chief Investment Officer (CIO) and directly oversee 1-3 Equity Analysts & 0-1 Junior Analysts. Each PM will be assigned a sector to cover, and collectively with the CIO will manage a portfolio of over \$3,500,000.

Sectors include:

- 1) Consumers & Healthcare
- 2) Energy, Materials & Utilities
- 3) Financials & Real Estate
- 4) Industrials
- 5) Technology, Media & Telecom (TMT)

PMs and their analysts will conduct research within their sector, perform detailed security analysis, and present their investment recommendations to the CIO. PMs will also receive guidance from the Advisory Committee of faculty members and finance professionals.

The ideal candidate should have strong presentation skills, an interest in finance, demonstrate a proactive approach to learning, and have knowledge and/or experience with security analysis.

## **Responsibilities**

*Portfolio Manager's responsibilities include, but are not limited to:*

- Leading their sector team and directly overseeing 1-3 Equity Analysts & Junior Analysts.
- Developing in-depth knowledge and understanding of their assigned sector and the companies within it.
- Organizing and reviewing equity research reports created by analysts & junior analysts.
- Presenting investment recommendations to the CIO at investment committee meetings.
- Reviewing, analyzing, and providing feedback on investment proposals by other sector groups.
- Staying informed on relevant macroeconomic events and sector-related news.
- Compiling quarterly financial reports.
- Presenting sector performance, transactions, and current holdings at quarterly Board meetings.
- Ensuring Equity Analysts' & Junior Analysts' deadlines are met, and deliverables are fulfilled.
- Additional duties as they arise.

## **Requirements**

*To be eligible for the position, a person must:*

- Be a current Bachelor of Commerce student in the Asper School of Business.
- Register for courses as a full time or part time student during the Winter 2025, Fall 2025, and Winter 2026 semesters.
- Enroll and successfully complete FIN 4230 in the Winter 2025 semester.

- Have a minimum GPA of 3.50.
- Have completed the following courses with a minimum grade of B+:
  - FIN 2010 – Introduction to Finance
- Have completed the Bloomberg Market Concepts (BMC) Course.
- Have experience with Microsoft Excel and PowerPoint.

### Commitment Level

Winter 2025	Summer 2025	Fall 2025	Winter 2026
Moderate (5-10 hours/week)	Moderate (5-10 hours/week)	High (10-15 hours/week)	High (10-15 hours/week)

PSMIF positions begin after successfully completing the FIN 4230 Applied Asset Management course in Winter 2025 and carry a 12-month term from May 1, 2025 to April 30, 2026. Co-op and/or work terms can be accommodated.

### Apply

Please submit your resume and transcript to [aspersmif@gmail.com](mailto:aspersmif@gmail.com) and [d.stangeland@umanitoba.ca](mailto:d.stangeland@umanitoba.ca). Please indicate your top 3 sector preferences in your application.

Application deadline is **November 10, 2024**.

More information on [www.pricesmif.com](http://www.pricesmif.com)