

Role Description Chief Investment Officer

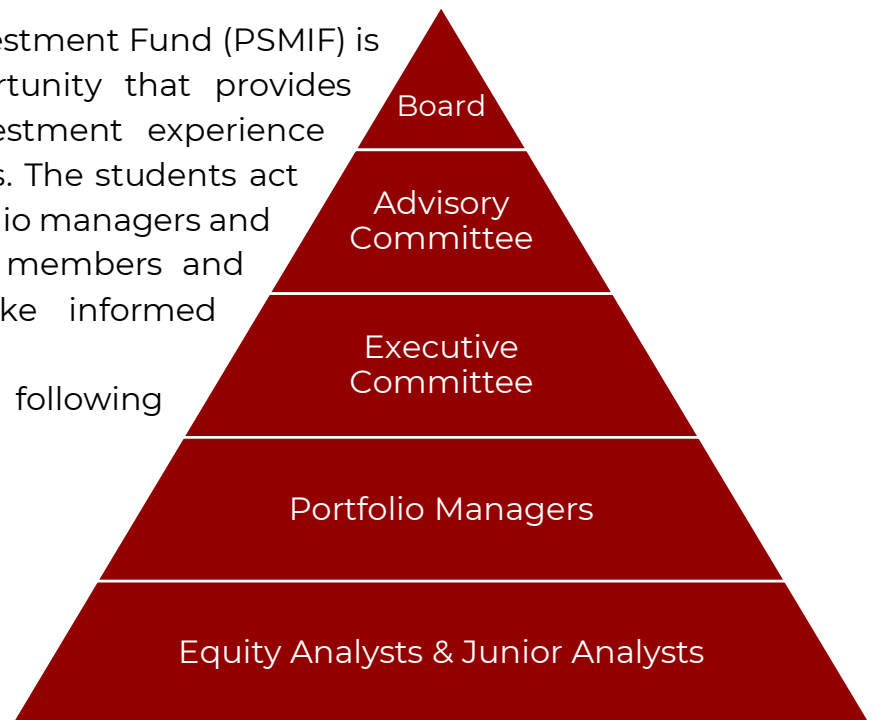
Last updated: 10/02/2024

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

Chief Investment Officer Role

The Chief Investment Officer (CIO) is an integral role that will oversee all investment-related activities of the Price SMIF. The CIO will directly oversee a team of 5 Portfolio Managers and set investment strategy for a portfolio of over

\$3,500,000. This individual will work closely with the Advisory Committee composed of faculty members and finance professionals.

The ideal candidate should possess strong leadership skills, be effective at communicating, and have knowledge and/or experience with equity investments.

Responsibilities

CIO responsibilities include, but are not limited to:

- Working alongside the Executive Committee to ensure the execution of the strategic vision and success of the PSMIF.
- Developing the overall investment strategy of the portfolio.
- Ensuring the PSMIF's investment portfolio is in accordance with the Investment Policy Statement.
- Creating and maintaining effective processes for making investment decisions.
- Reviewing, analyzing, and providing feedback on investment proposals.
- Allocating and deploying capital to sector groups.
- Monitor sector performance relative to their respective benchmarks.
- Staying informed on relevant macroeconomic events and sector-related news.
- Conducting the recruitment and interview process for all Portfolio Manager, Equity Analyst and Junior Equity Analyst positions with the Executive Committee and Faculty Advisor.
- Ensuring all Portfolio Managers and Equity Analysts are adequately trained and able to make informed investment decisions.
- Holding sector teams accountable for meeting deadlines and fulfilling deliverables.
- Organizing and approving quarterly financial reports.
- Presenting fund performance at quarterly Board meetings.
- 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 of 60 credit hours completed at the time of application.
- Have a minimum GPA of 3.50.
- Have completed the following courses with a minimum grade of B+:
 - FIN 2010 – Introduction to Finance
 - One additional finance course
- 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
Medium (5-10 hours/week)	High (10-15 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, transcript, and a 300 word letter explaining why you want to be involved to aspersmif@gmail.com and d.stangeland@umanitoba.ca.

Application deadline is **November 2, 2024**.

More information on www.pricesmif.com