

CAPITAL MARKETS AND INVESTMENTS

Invest in your career with confidence.

Designed to teach practical finance skills critical to success in the asset management field, including analysis, portfolio management, and sales and trading, our curriculum provides a strong foundation on investments, numerous experiential learning opportunities, and an array of electives that allow students to tackle specific areas relevant to their individual career aspirations.

EDUCATIONAL RESOURCES

Center for Excellence in Investment Management

[The Center](#) integrates and supports the research, teaching, career preparation and alumni engagement that prepares leaders to succeed in the investment management field. It aims to create a community of professionals engaged in lifelong learning and career development in all investment management disciplines while placing a focus on creating a cutting-edge program that is relevant to the industry. They do so by embedding aspects such as AI, DEI and environmental, social and governance issues into their offerings.

Finance Development Program (FDP)

Taught by experts from Training the Street™, the FDP supplements the academic curriculum with the requisite practical skills for successful careers in corporate finance, investment management or investment banking, including courses in financial modeling and corporate valuation.

Capital Markets Lab

Students hone key skills of financial services professionals in this state-of-the-art learning environment. With 20 Bloomberg terminals and access to other resources such as Factset, the lab provides a real-world setting for students to manage equity and fixed-income portfolios.

Select Career Clubs

Career clubs focused on Investment Banking, Investment Management, Corporate Finance and Entrepreneurship and Venture Capital provide practical insights.

World-class Faculty with Board Experience

Numerous faculty with practical investment experience and CFA charters interact continuously with a selected board of investment professionals from the world's leading asset management firms.

EXPERIENTIAL LEARNING

Investment Management Practicum

This unique offering provides students with the opportunity to gain a better understanding of the industry. The course supports students in



their spring projects and prepares them for summer investment management internships, which help them secure full-time job offers.

Alpha Challenge

Hosted annually by UNC Kenan-Flagler, this two-day competition is one of the world's premier investment pitch competitions. Teams from top business schools pitch investment recommendations to an acclaimed group of buy-side investment professionals. The event brings together over 50 top investment management firms, which offer interviews and networking opportunities.

Student-Managed Funds

Students manage live portfolios in public securities through the Global Perspectives hedge fund, a private equity fund, and a real estate fund, developing tangible skills in global macroeconomic asset allocation, portfolio management, and investment communication.

National Investment Pitch Competitions

Students apply their knowledge and network with peers and professionals at company-sponsored competitions, which provide opportunities to apply industry and technical knowledge and to showcase strategic thinking and presentation skills to potential employers.

SELECT COURSES OFFERED

- » Alternative Investments
- » Applied Investment Management (Student Managed Fund)
- » Applied Trading Strategies: Derivatives and Hedge Funds
- » Current Topics in Finance: FinTech
- » Derivatives
- » Financial Risk Management
- » Fixed Income
- » Impact Investing
- » Investments I
- » Investments II
- » Private Equity
- » Private Wealth Management
- » Projects for Investment Management Experiential-Learning – PRIME program
- » Quantitative Methods in Finance



KENAN-FLAGLER BUSINESS SCHOOL
Full-Time MBA

mba.unc.edu/capitalmarkets

For more information: mba_info@unc.edu



PROFESSIONAL AND CAREER DEVELOPMENT

Company Presentations and Speakers

Over 20 financial services firms present information on employment opportunities, provide additional networking opportunities and share industry case studies. UNC Kenan-Flagler draws pre-eminent industry leaders to engage with our students through guest lectures in our classes, fireside chats, panel discussions and small-group dinners.

Career Treks

An important networking opportunity, career treks allow students to visit top financial services firms to enhance their understanding of careers in investment banking, investment management, and private wealth management.

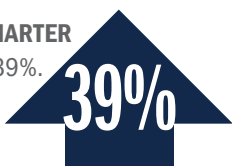
“Students have access to key industry resources, including Bloomberg and Factset, and development opportunities through our partners at the CFA and CAIA institutes. The combination of academic and practical training, investment resources, and asset management firm exposure provide an outstanding platform that help students launch successful careers in investment management.”

Dr. Ric Colacito
Professor of Finance and Sarah Graham Kenan Scholar
Faculty Director, Center for Excellence in Investment Management

Chartered Financial Analyst (CFA) Exam Program Scholarships

As a partner school with the CFA Institute, UNC Kenan-Flagler has access to numerous resources, including up to 7 scholarships for the CFA exam program.

HOLDING A CFA CHARTER
increases average pay by 39%.



Finance Club Meetings

Several clubs, in collaboration with our Career & Leadership team, host regular meetings to guide students through the recruiting processes, including networking and interview preparation.

Career Workshops

Fundamental Investing Practicum : Buy-side focused investments analysis taught by a portfolio manager at William Blair with mentorship from investment managers.

Finance for All / Financial Services 101: Overview of financial services careers, including investment banking, investment management, private wealth management, and corporate finance.

Introduction to Excel & Financial Modeling: Introduction to efficient Excel navigation and building dynamic financial projections and modeling.

Corporate Valuation and M&A Strategy: Fundamentals of key valuation methods including comparables company analysis, discounted cash flow, merger analysis, and leveraged buyout analysis.

Tracking the Markets and General Economy: The macroeconomic environment and key economic indicators that impact the financial markets.

Interview Prep: Investment Banking and Private Equity: Prepares candidates for the “fit” and technical portions of the investment banking and private equity interview.

Advanced Excel: Advanced Excel content including scenario analysis, analyzing data via Lookup functions and Pivot Tables, working with text data and building macros.

CAREER PATHS

- » Asset Management
- » Corporate Treasury
- » Equity/Fixed Income Analyst
- » Investment Banking
- » Private Equity/Credit
- » Private Wealth Management
- » Regulatory Compliance
- » Risk Management
- » Sales and Trading

KEY EMPLOYERS

- » American Century
- » Artisan Partners
- » Bank of America
- » Diamond Hill
- » Eagle Asset Management
- » Goldman Sachs
- » Jefferies
- » JPMorgan
- » Morgan Creek
- » Southpoint
- » Thornburg
- » T. Rowe Price
- » Unum
- » William Blair

COMPENSATION*

BASE SALARY SIGNING BONUS TOTAL
\$146,779 + \$34,555 = \$181,334

*Mean compensation in 2023 for UNC Kenan-Flagler Full-Time MBA graduates