

# 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 inspires a passion for investing within our students through real-world experiences, creating leaders uniquely empowered to take the industry into the future. Our primary goal includes creating a community of professionals engaged in lifelong learning and career development in all investment management disciplines: public and private equity and credit, capital allocation, private wealth management and quant.

### 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

### Projects for Investment Management Experiential Learning (PRIME)

This unique offering provides students with the opportunity to gain breadth and depth in the investments industry. The course works with ~16 investment firms supporting students in their spring projects and prepares them for summer investment management internships, which will help them secure full-time jobs.



### Alpha Challenge

Hosted annually by the Center, 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 70 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.

### Investment Management for All: Wealth & Women

The Investment Management industry can be intimidating from the outside, particularly for minority populations. This annual event helps to address these barriers through networking, workshops, group and individualized pitch coaching, and informational chats - exposing students to the different career paths within the industry and the nuances of each.

## SELECT COURSES OFFERED

- » Applied Investment Management (Student Managed Fund)
- » Applied Trading Strategies: Derivatives and Hedge Funds
- » Current Topics in Finance: Financial Technology Tools
- » 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



## 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 in Boston, Charlotte, Chicago and New York to enhance their understanding of careers in investment banking, investment management, and private wealth management.

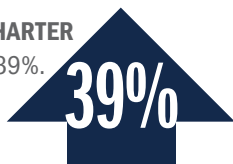
“Students have access to key industry resources, including Bloomberg and Factset, and development opportunities through our partners at the CFA and CAIA institutes. The combination of academic and practical training, investment resources, and asset management firm exposure provide an outstanding platform 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 the Center and Career & Leadership, 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 partner 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.

**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
- » Bank of America
- » Brown Advisory
- » Diamond Hill
- » Eagle Asset Management
- » Goldman Sachs
- » H/2 Partners
- » Jefferies
- » JPMorgan
- » Morgan Creek
- » SharpVue Capital
- » Southpoint
- » The London Company
- » Thornburg
- » Thrivent
- » T. Rowe Price
- » Unum
- » William Blair

## COMPENSATION\*

**BASE SALARY**      **SIGNING BONUS**      **TOTAL**  
 \$140,490 + \$33,422 = **\$173,912**

\*Mean compensation in 2024 for UNC Kenan-Flagler Full-Time MBA graduates