

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

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 or investment banking, including courses in financial modeling, corporate valuation, deal structures, interview preparation, and many other topics.

- 8 separate course modules, which can be taken individually or collectively
- In-depth instruction and insights on all investment banking valuation models

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, Private Wealth Management, and Entrepreneurship and Venture Capital provide networking opportunities with leading employers through career treks, practical insights into potential careers, and peer learning and collaboration.

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

Alpha Challenge

Hosted annually by UNC Kenan-Flagler, this two-day competition is one of the world's premier stock pitch competitions. Teams from top business schools pitch investment recommendations to an acclaimed group of buy-side investment professionals. The event brings together over 40 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 Case 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 & Hedge Funds
- » Corporate Valuation and Financial Strategy
- » Current Topics in Finance: FinTech
- » Derivatives
- » Financial Risk Management
- » Financial Statement Analysis
- » Fixed Income
- » Global Finance and Emerging Markets
- » Impact Investing
- » Investments
- » Private Equity
- » Private Deal Structures
- » Private Wealth Management
- » Quantitative Methods in Finance



PROFESSIONAL AND CAREER DEVELOPMENT

Company Presentations and Employer Office Hours

Over 20 financial services firms present information on employment opportunities, provide additional networking opportunities and share industry case studies. Firm representatives hold on-site office hours, providing a forum for students to develop relationships and gain career advice from major employers.

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.”

Ric Colacito, PhD
 Professor of Finance
 Concentration Leader, Capital Markets and Investments

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 10 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 (Applied Equity Analysis): 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
- » Equity/Fixed Income Analyst
- » Investment Banking
- » Private Equity
- » Private Wealth Management
- » Risk Management
- » Regulatory Compliance
- » Sales and Trading

KEY EMPLOYERS

- » American Century
- » Bank of America
- » Credit Suisse
- » Dimensional Fund
- » Evercore
- » Goldman Sachs
- » Jefferies
- » JPMorgan
- » Morgan Stanley
- » PIMCO
- » T. Rowe Price
- » Wells Fargo Securities
- » William Blair & Company
- » Yacktman Funds

COMPENSATION*

BASE SALARY	SIGNING BONUS	TOTAL
\$125,687	+ \$29,751	= \$155,438

*Mean compensation in 2021 for UNC Kenan-Flagler Full-Time MBA graduates