CFA Society Chicago Visits Campus
In September, CFA Society Chicago’s Shannon Curley and Nicole Harris visited campus to discuss the upcoming CFA Research Challenge with the SMP analysts and a few MSFRM students.

Universities are permitted to register up to two 3-5 member teams, which are each advised by a Finance faculty member and an assigned industry CFA-charter holder mentor. In the first round of the regional competition, each team prepares an equity research report with a Buy, Hold or Sell recommendation on a locally-headquartered publicly-traded company. In the second round, teams will travel to Chicago’s Morningstar building to give a 10-minute presentation (followed by a 10-minute Q&A session) to a panel of judges consisting of CFAs and members of featured company’s senior management. Following the presentation, analysts will field a 10-minute Q&A session. The regional first place winners will advance to the national competition in Boston, PA, which is then followed by the global competition in Seoul Korea.

Portfolio Statistics
- Portfolio Beta: 1.03
- Percent Invested: 99.13%
- Number of Holdings: 46
- Dividend Yield: 1.32%
- Expense Ratio: 0.08%

Upcoming Events
10/9 & 11/11: SMP analysts recruit at an NIU Open House.
10/5-10/6: Indiana State University’s Student Managed Investment Fund Consortium.
Meet the Analysts!

Ellen Balzer – Intermediate Analyst (Real Estate)
A senior finance major with a minor in political science, Ellie is the Marketing VP for Women in Business Professions and a member of the Financial Management Association. Outside of school she has an internship at MPPL Financial in Crystal Lake. Upon graduation, she hopes to pursue a career in financial analysis and attain the CFA designation.

Sean Gormley – Intermediate Analyst (Consumer Discretionary)
Sean is a senior finance major working as a credit risk analyst intern with First National Bank, the largest privately held bank in the country. He aspires to be a private equities analyst and eventually move into investment banking. He also plans on obtaining the CFA designation.

Allison Masek – Intermediate Analyst (Utilities)
A senior finance major in the Honors program, Allison currently works as a College Financial Representative with Northwestern Mutual. She will join NM full time upon graduation as a Financial Representative. Allison has also been involved with the NIU Investment Association, the NIU Financial Management Association, and the Out for Undergrad (O4U) Business Conference.

Nicole Szeszel – Intermediate Analyst (Materials)
Nicole is a senior finance major who participates in the Financial Management Association, Dean’s Student Advisory Board, and also currently works on an Experiential Learning Center team for Medline Industries performing competitive intelligence and benchmarking.