



VAN BERKOM INVESTMENT MANAGEMENT PROGRAM

INVESTING IN YOUR FUTURE

The Van Berkom Investment Management Program (VBIMP) will provide a small group of select JMSB graduate and undergraduate students with an experience that will open the door to a career in capital markets. Each year, six to eight students will be admitted in order to actively manage a portfolio of small-cap stocks with the aim of outperforming a benchmark prescribed by the investment policy statement. New program recruits will complete the first-year in the VBIMP as research associates (RAs). Upon entering their second year in the program and subject to a positive performance evaluation, RAs will assume the responsibility of managing the fund and earn the title of fund managers (FMs).

Duties and Responsibilities of Research Associates

The primary role of incoming research associates is to support the fund managers who will be managing the VBIMP portfolio. As delegated by the FMs, RAs will assist by performing fundamental research and writing stock reports. RAs also have the opportunity to work on their own stock pitches, which are presented to the investment committee made up of senior investment management professionals. In order to better assume these responsibilities, RAs will participate in financial modelling, FactSet and Bloomberg "boot camps", as well as training from Career Management Services about obtaining internships and full-time employment in capital markets. RAs are also given the chance to connect with investment management professionals as mentors and will be able to direct high-level questions towards their mentors.

Applied Investments Course

Upon acceptance, VBIMP research associates will be enrolled in FINA 409 "Applied Investment Analysis", a course which will focus on teaching stock valuation methods and effective stock pitching. It will consist of lectures provided by industry experts. By the end of the semester, every RA is expected to submit a professionally-written report and valuation model.

Duties and Responsibilities of Fund Managers

The primary responsibility of the fund managers is to actively manage the portfolio. To become a fund manager, an RA must have completed two pitches as well as having maintained a minimum cGPA of 3.5 within the first year of being in the program. Fund managers will assume management of the portfolio as of January 1 and will be responsible for its performance until December 31 of the same year.

Admission Qualifications and Requirements

- This program is open to both undergraduate and graduate students
- Earliest graduation date of December 2022
- Strong passion for capital markets
- Strong interpersonal and teamwork skills
- Strong academic record (minimum GPA of 3.5)
- Willingness to commit a minimum of ten hours a week to the program

Info Sessions

- **Tuesday September 15th, 2020 6 p.m. Meet 'N Greet with Sebastian Van Berkom**
- **Wednesday September 16th 8:30 p.m. Bottom-up stock valuation workshop**
- **Monday September 28th, 2020 6 p.m.**

Applications and Deadlines

Students may request the application package from the program director Professor Amr Addas by email: amr.addas@concordia.ca. **The application package must be submitted by Friday, October 23rd, 2020**

Selection Process

A review committee will select the applicants to be invited for the interviews on October 31st and November 1st, 2020. Final selections will be announced by mid-November 2020.

Please direct any questions to the program director:

Professor Amr Addas
amr.addas@concordia.ca

CONCORDIA.CA/JMSB/VBIMP

WE LOOK FORWARD TO MEETING YOU SOON