Duties and Responsibilities of Research Associates

Primary role of incoming research associates (RAs) is to support the fund managers (FMs) who will be managing the VBIMP portfolio. As delegated by the FMs, RAs will assist by performing research and writing stock reports. RAs also have the opportunity to work on their own stock pitches, which are presented to the investment committee. In order to better assume these responsibilities, RAs will enroll and successfully complete an applied investment course, participate in financial modelling, FactSet and Bloomberg “boot camps”, receive training from library staff on research, receive training from JMSB’s Career Management Services about obtaining internships and full time employment in capital markets and complete an internship.

Applied Investments Course

Upon acceptance, VBIMP research associates will be enrolled into FINA 695 “Small Cap Investing”, a course which will focus on evaluating stocks using modern methods on valuation, writing stock reports as well as pitching stocks. It will consist of lectures, discussions of book chapters, presentations by industry experts, and use of the investment lab (Formula Growth room). The main topics include: a) understanding the different investment styles b) reading accounting statements from an investor’s point of view c) industry analysis d) stock analysis and valuation. The course will be held during the winter term each year, and will count for 6 credits.

Duties and Responsibilities of Fund Managers

Reporting to the Investment Committee and overseen by the program director, FMs are second-year VBIMP students having completed/maintained the following as RAs:

- FINA 695 Small Cap Investing
- A GPA exceeding 3.5

They will assume the management of the portfolio on January 1 and be responsible for its performance until December 31, of that same year. They must add value to the fund as per the requirements established in the fund’s investment policy statement.

What is the Van Berkom Investment Management Program?

A two-year program focused on providing six to eight students with:

- Extensive training in portfolio management
- Real-life financial experience through actively managing a $1 million small cap stock portfolio
- Quarterly presentations to an investment committee comprised of top industry professionals
- Work internship opportunities in top financial firms
- Mentorship from highly-respected finance professionals

Admission Qualifications and Requirements

- Bachelor of Commerce or Administration, MBA, MSc in Finance, EMBA, MBA with complete CFA® integration, PhD -Finance and CPA candidates will be eligible to apply
- The VBIMP is a two-year commitment
- Strong interest in the financial markets
- Strong interpersonal and teamwork skills
- Strong academic record (e.g. minimum undergraduate GPA score of 3.5. Current program GPA will also be considered or GPA of 3.5)
- Availability to commit approximately 10-15 hours a week
Info Sessions
Thursday, October 4, 2018
8 p.m. to 9 p.m.
MB-14.250

Applications
Available at the receptionist's desk, JMSB Graduate Program office, MB-6.201
or from the program director by email denis.schweizer@concordia.ca

Deadline
Wednesday, October 31, 2018
Submit your application package at the JMSB Graduate Programs office,
MB-6.201 (receptionist).

Selection Process
A review committee will select the applicants to be invited for interviews
on November 10 and 11, 2018. Final selections should be announced by
December 2018.

PLEASE VISIT US AT CONCORDIA.CA/JMSB/VBIMP

Direct any questions to the program director:
Dr. Denis Schweizer
denis.schweizer@concordia.ca

WE LOOK FORWARD TO MEETING YOU SOON