



Introducing



UTMCAP



2025-2026
Opening Ceremony



ICE BREAKER ACTIVITY

AGENDA

- /01 **MEET THE TEAM**
- /02 **OUR FUND**
- /03 **EVENTS & WORKSHOPS**
- /04 **INVESTMENT LEADERS**
- /05 **ANALYST PROGRAM**
- /06 **CASE COMPETITION TEAM**



Christopher Jaeckl
Co-President



Fedor Khottchenkov
Co-President

Meet the Team

Executives

2025-2026



Martin Kononenko
VP Finance



Azeem Khalifa
VP Alumni Relations



Farah Hernandez Bravo
VP Marketing



Yasmeen Sabunchi
VP Internal



Zain Irfan
VP Case Comp



Sami Shahzad
Co-VP Events



Allan Chen
Co-VP Events

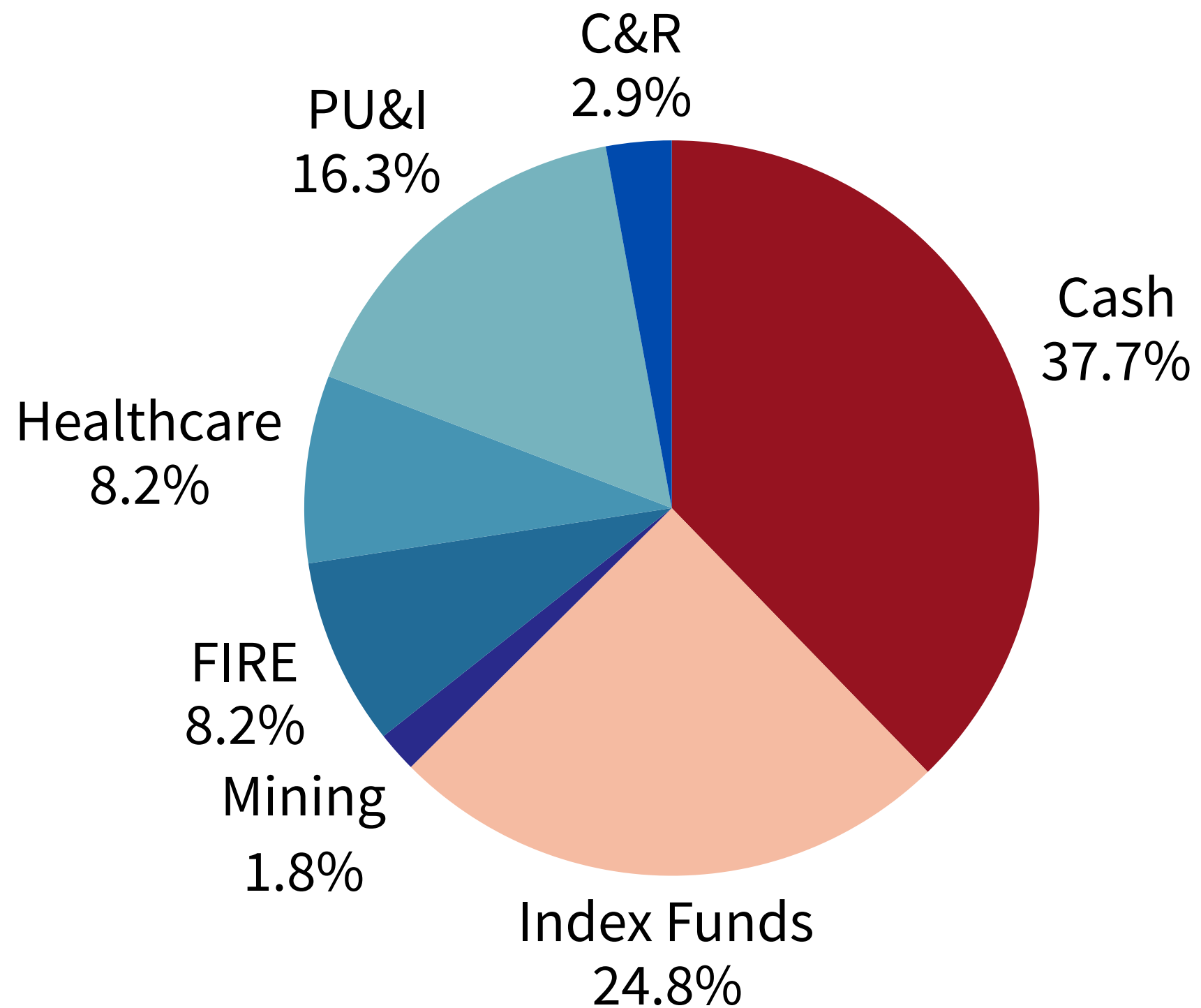
PURPOSE AND VALUES

Purpose

- Educate students on the value investing approach.
- Equip students with relevant, hands-on skills to succeed in their careers.
- Manage a well-diversified investment portfolio.

Values

- Collaboration
- Education
- Community & Inclusivity



CURRENT PORTFOLIO

Investment Philosophy

Long-term investments

Student-led investment research

Based on current macro & micro environment

Portfolio adjusted periodically



EVENT HIGHLIGHTS

Speaker Series

Recurring



Mock Stock Pitch Competition

January



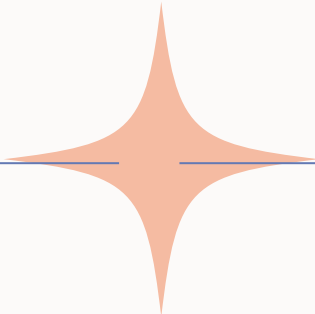
Alumni Panel

February



Closing Ceremony

March



WORKSHOPS

Weekdays

6-8PM

Starting Oct. 3rd

Equity Research
Walkthrough

FLC Technology
Walkthrough

Marquee Financial
Modeling Training





ANALYST PROGRAM



COVERAGE GROUPS

Technology, Media and Telecom
(TMT)



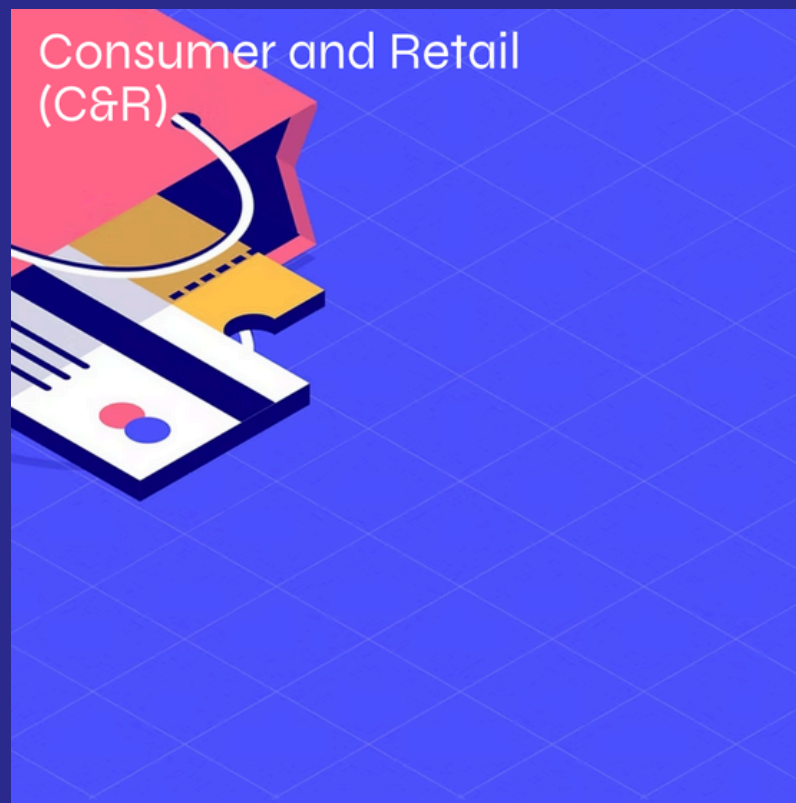
Metals and Mining
(M&M)



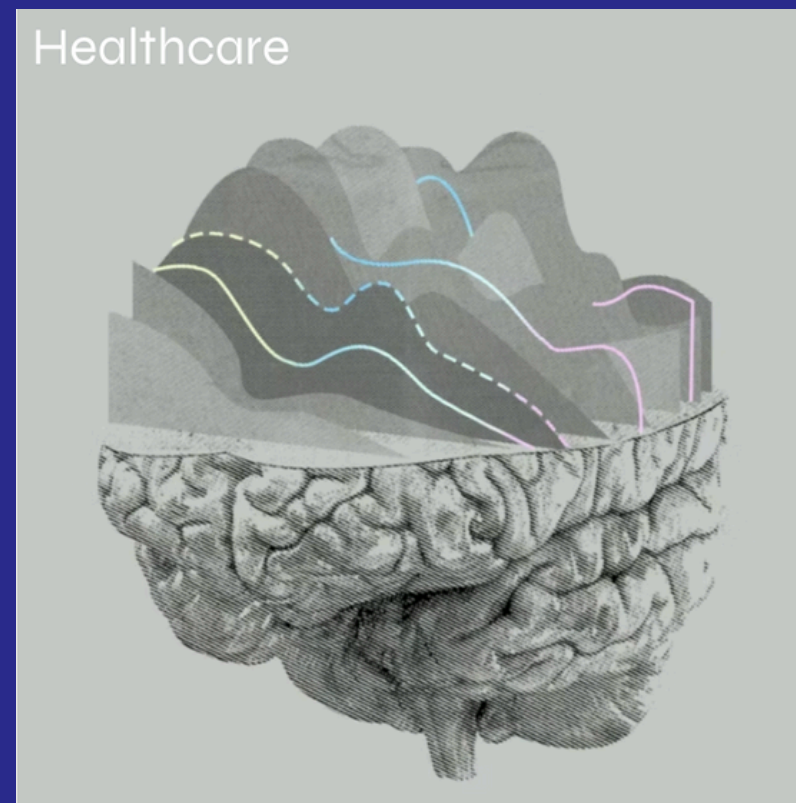
Power, Utilities and Infrastructure
(PU&I)



Consumer and Retail
(C&R)



Healthcare



Financial, Insurance and Real Estate
(FIRE)





TEAM STRUCTURE

INVESTMENT LEADER

SENIOR ANALYST

ALUMNI MENTOR

ANALYSTS

ALUMNI MENTORSHIP

Goldman
Sachs



Deloitte.

Scotiabank™
GLOBAL BANKING AND MARKETS

WELLS FARGO



J.P.Morgan





Hasnat Ellahi
**Financial Institutions
and Real Estate (FIRE)**



Ankush Koshal
Consumer and Retail (C&R)



Shahab Desai
Healthcare



Eric Lee
Metals and Mining (M&M)



Vincent Hon
**Technology, Media and
Telecom (TMT)**



Callum Bowness Linegar
**Power, Utilities and
Infrastructure (PU&I)**

CASE COMPETITION TEAM.



Hiring Process
Training Workshops
Case Competitions

ED RIECKELMAN

- UTM Management Adjunct Professor and Finance Executive in Residence
- President, True North Investors Inc.
- Faculty advisor to UTM Capital
- UTM Capital Board Member



ALUMNI EXPERIENCE



UTMCAP

2025-2026



THANK YOU

Q&A

