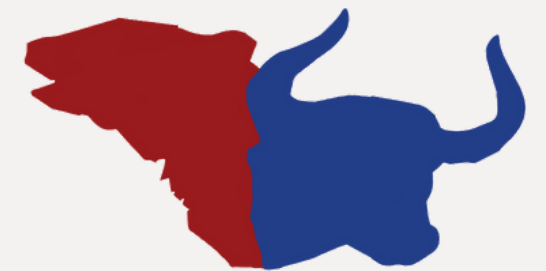


**UTM****CAP**

**OPENING CEREMONY 2023**





# OPENING SPEECHES



**Arsalan Arshad**

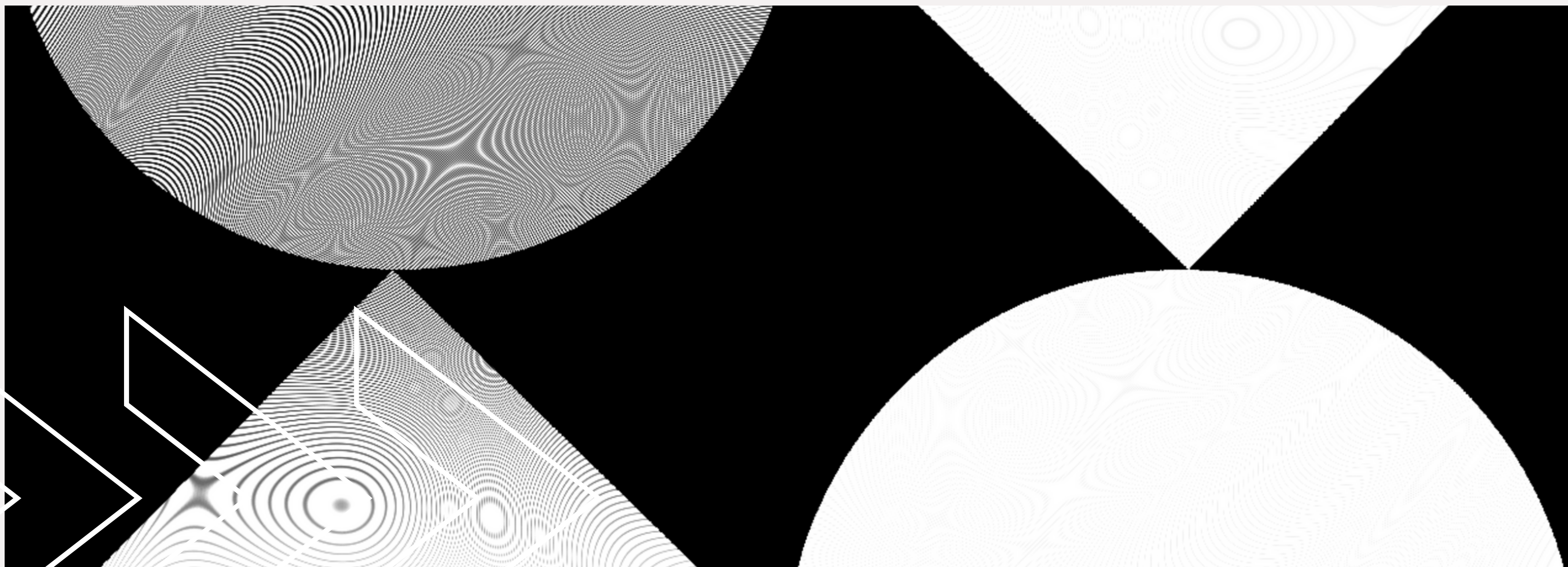


**Nilesh Goburdhun**





# AGENDA



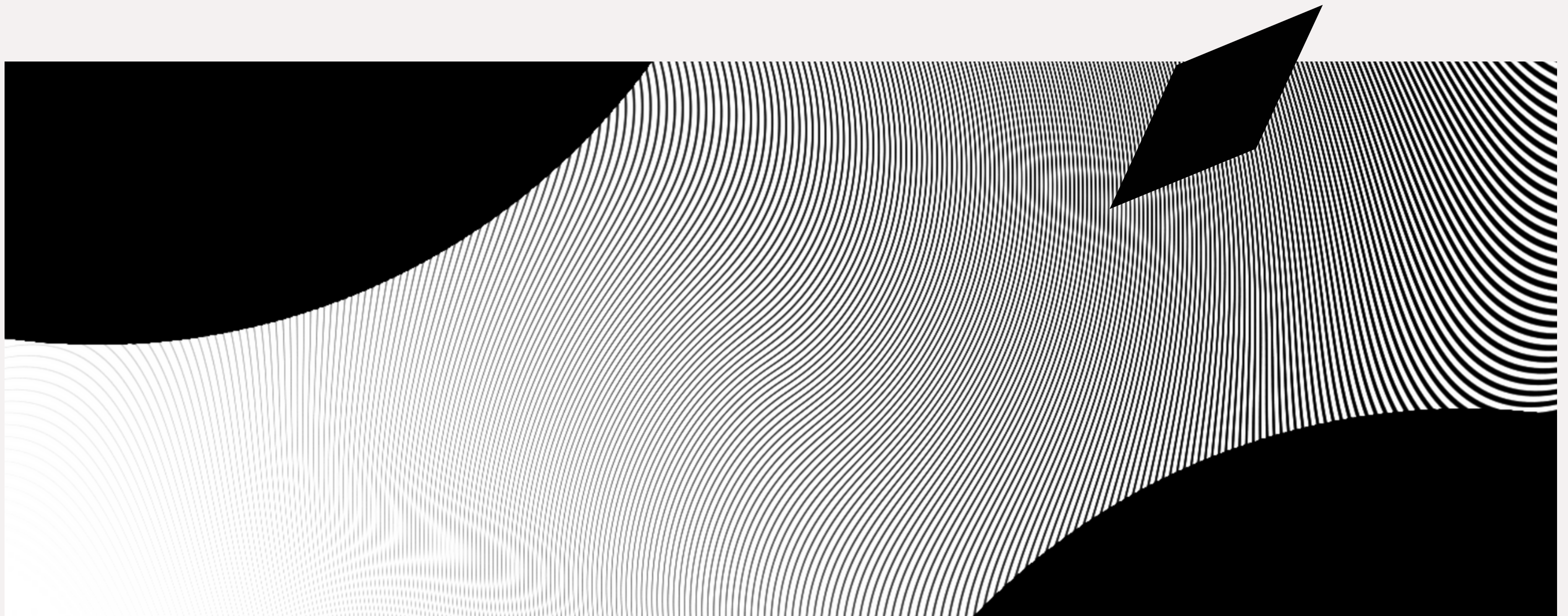
OPENING SPEECHES

# AGENDA

- Introduction to UTM Capital
- 2023-2024 Plan
- Analyst Registrations & Coverage Groups
- Experiences of Club Executives
- Ed's Closing Remarks
- Networking and Refreshments



# INTRODUCTION TO UTM**CAP**



# UTM CAPITAL

UTM Capital is UofT Mississauga's **first** and **only** investment fund and club.

## Our Purpose:

Educate students on the value investing approach.

Equip students with relevant, hands-on skills to succeed in their careers.

Managing a well-diversified investment portfolio.

## Our Values:

Inclusivity

Collaboration

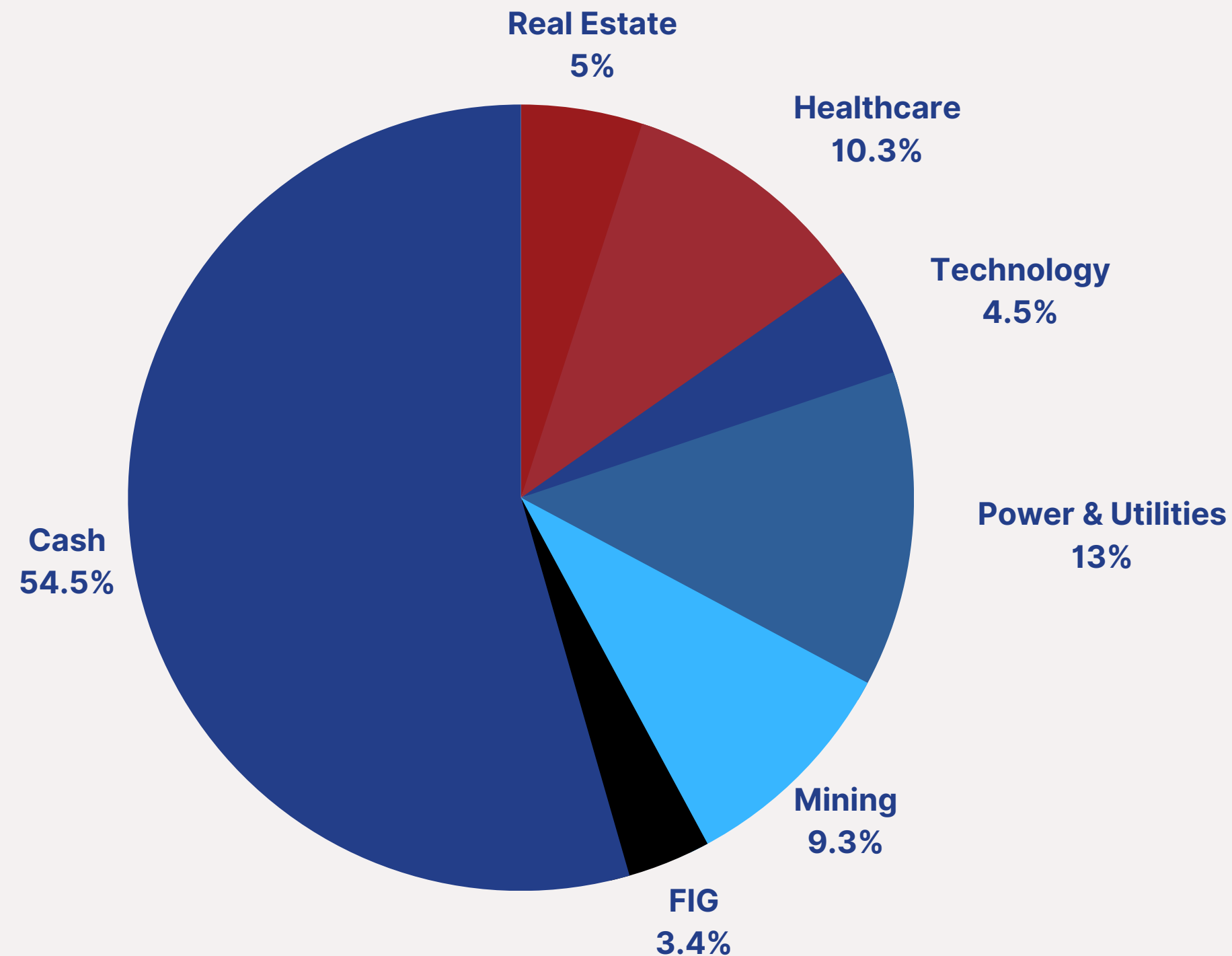
Education



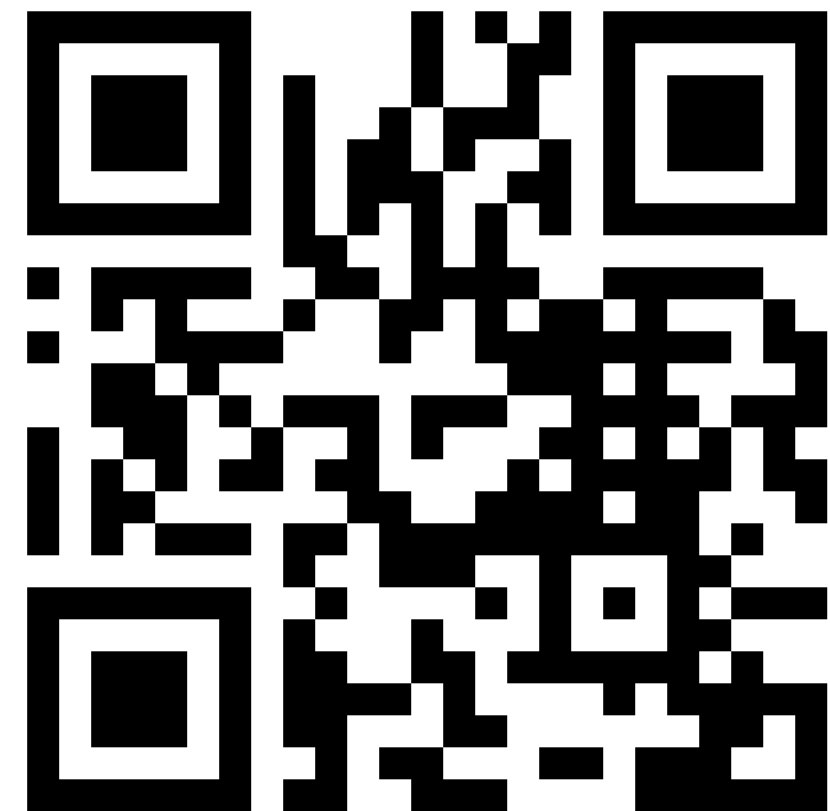
UTMCAPITAL



# OUR INVESTMENT FUND



**Check out our  
website!**



**utmcapital.ca**

# WHAT DOES THE CLUB ACTUALLY DO?

- Investment Research
  - Bi-Weekly Coverage Group Meetings
- Speaker Series Events
- Networking and Career Development Events
- Skill Development Workshops
- Something new this year.....



# BI-WEEKLY MEETING STRUCTURE

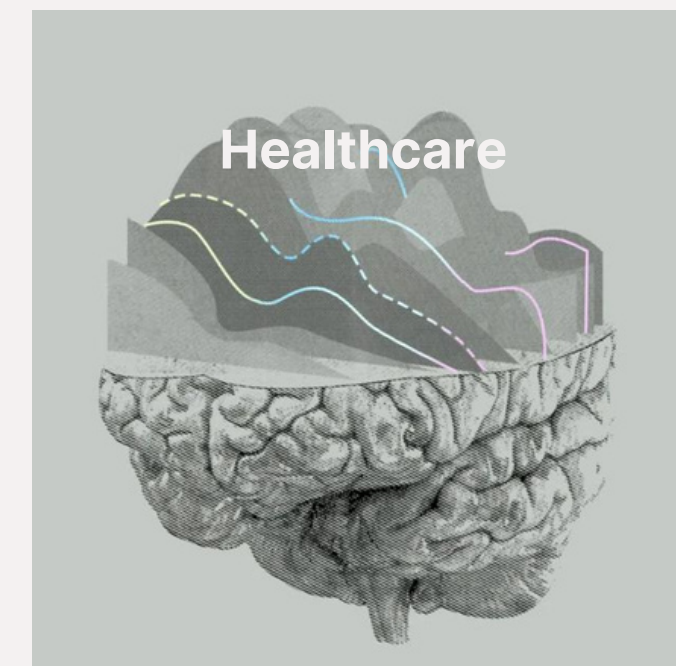
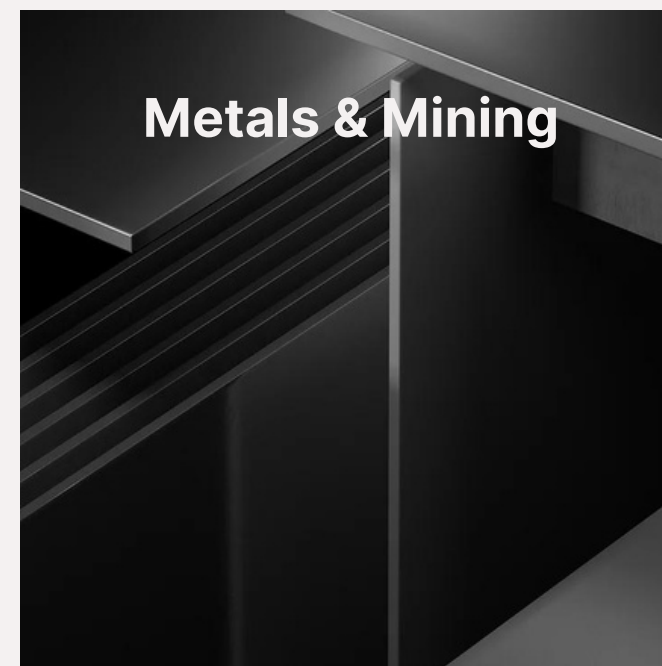
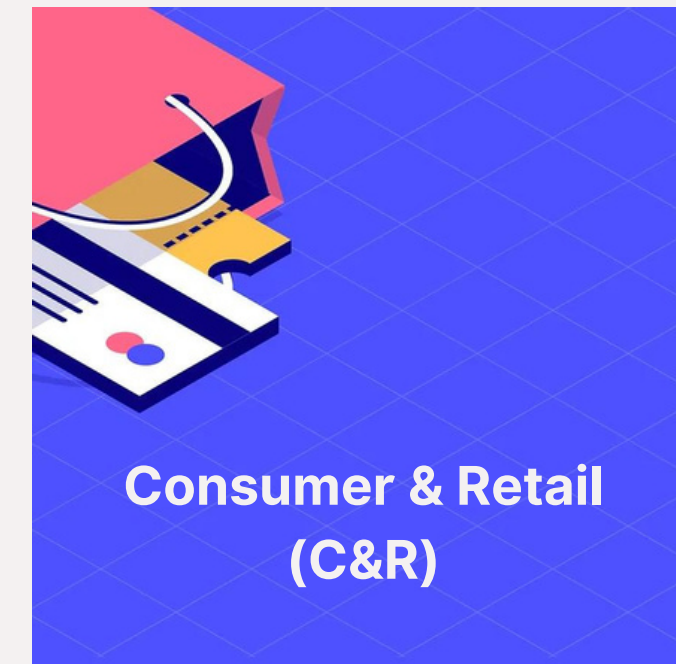
## How it works?

- Each analyst is assigned to a coverage group.
- Investment Leader's lead coverage groups.
- Coverage Groups meet on a bi-weekly basis to conduct in-depth equity research throughout the year.
- Our first bi-weekly meeting will be next Tuesday, September 26th.

## Purpose:

- To research a company and provide the club with an investment recommendation.

# WHAT ARE THE COVERAGE GROUPS?





# MEET THE EXEC TEAM



**Nilesh Goburdhun**  
**Co-President**



**Arsalan Arshad**  
**Co-President**



**Ayden Rokx**  
**VP, Case Competitions**



**Kim Nguyen**  
**VP, Marketing**

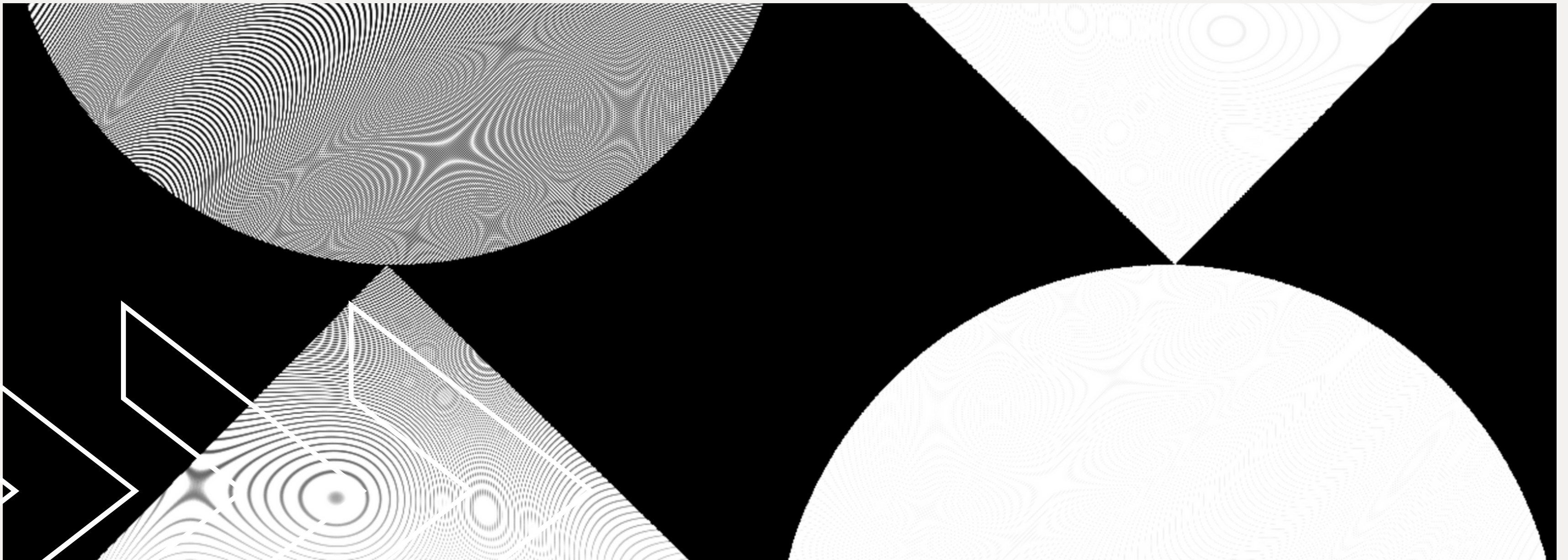


**Roy Yang**  
**VP, Finance**



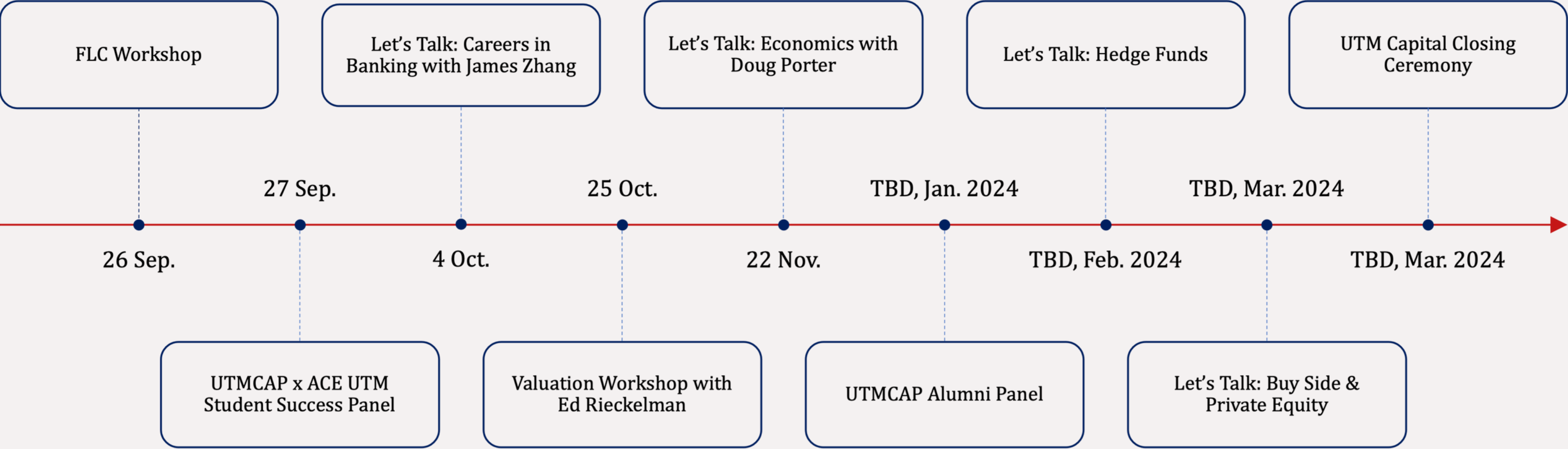
**Carrie Dang**  
**VP, Events & Operations**

# WHAT'S IN STORE THIS YEAR?





# EVENT CALENDAR OVERVIEW



**Fall 2023**

**Winter 2024**

# FLC WORKSHOP

Learn the basics of navigating the FLC's resources including an introduction to **FactSet and Bloomberg!**

Intended for **new members** of the club and new students!

Limited spots are available. Register on a first-come, first-served basis.

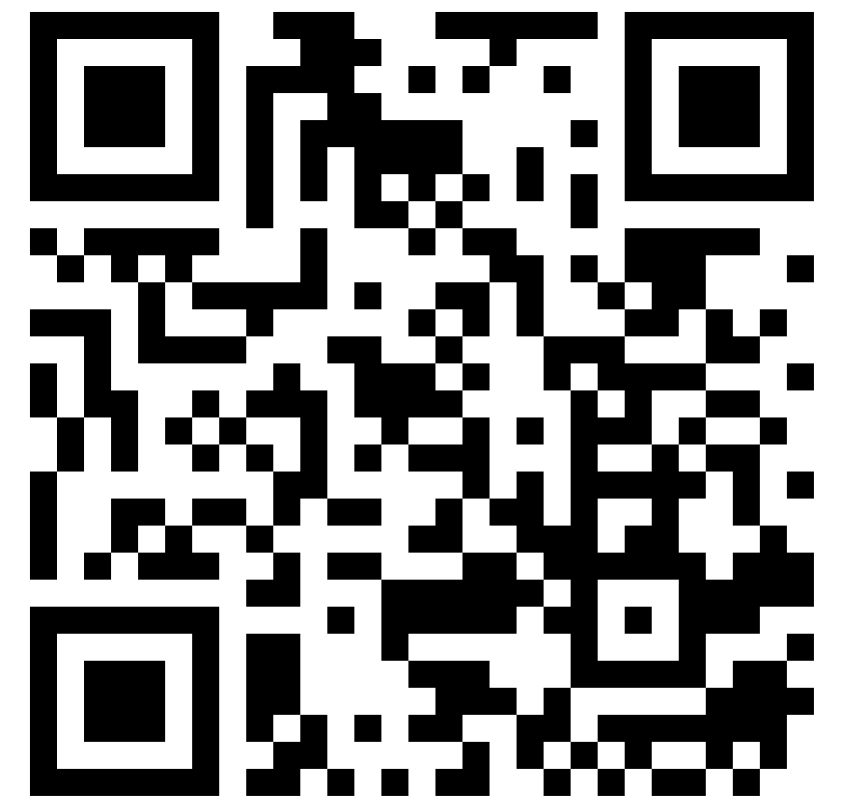
**Date:** Tuesday, 26th September

**Time:** 6-7pm

**Location:** FLC, KN Basement

Registrations close **Friday, 22nd September.**

You will receive a confirmation email.



# EVENT REGISTRATION

Follow us on Instagram @**utmcap** to stay tuned for all our events.

Registration for all events opens a week before the date of the event.

Registration links can be found on our Instagram page and on *UTMMcentral*.



Instagram



*UTMMcentral*



# WHAT IS NEW THIS YEAR?

## UTM Capital Case Competition Team “UTMCAP Case Team”

Subset of UTMCAP focused on **external capital markets-oriented case comps.**

The Case Team will help students:

- **Test abilities** they’ve developed as UTMCAP members
- **Explore & learn** more about different career paths
- **Make connections** with industry professionals & students from other schools



**Ayden Rokx**  
**VP, Case Competitions**

# CASE TEAM DETAILS

Case Team Associates will be provided with a **selection of case competitions** for the Fall and Winter semesters (associates may make recommendations). Everyone will vote to choose case comps and teams will be formed.

Case Competition Categories:

- **Public Equities:** Long/Short, Equity Research, Financial Advisory
- **Deal Recommendations:** M&A, Structuring Transactions
- **Private Equity:** Investment Evaluation
- **Technical:** Paper Day-Trading, Trading Simulations, Financial Modelling
- **Other:** Mock Interviews, Workshops, etc.



# APPLICATION PROCESS

- Associates must be **existing or new UTMCAP members**  
(Investment Leaders are welcome to apply as well)
- Associates must be in at least their **2nd year** at UTM
- Associates must **participate in at least 2 case comps** over the year
- Applicants will fill out a simple application form (attach copy of resume) and conduct a brief interview

Assets to have (not requirements):

- **PowerPoint/Presentation**
- Financial Modelling in Excel
- **Research & Valuation**
- Teamwork & Time Management
- Coding/Stats/Econ/Finance + other related proficiencies

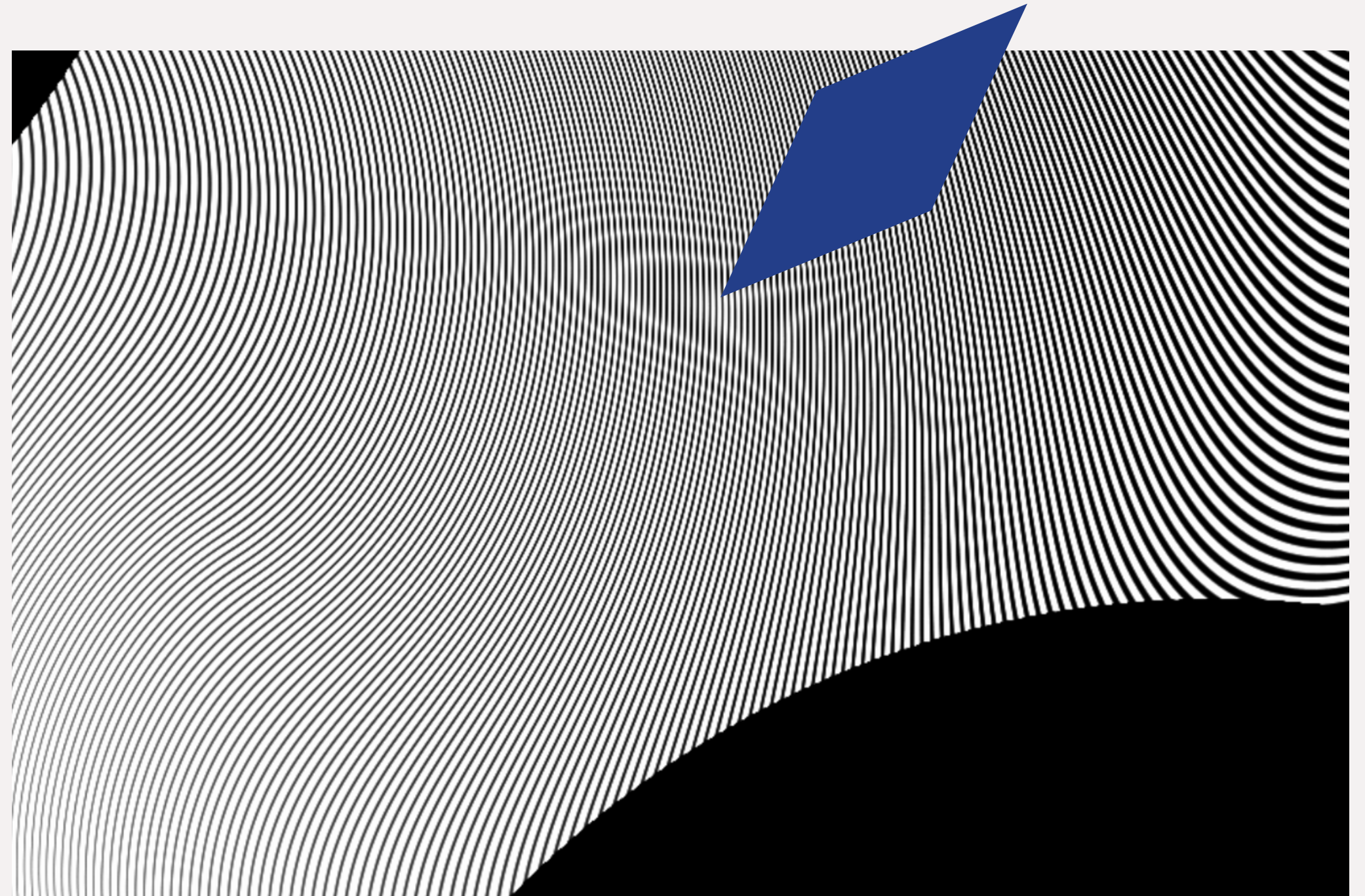


# ANALYST REGISTRATION PROCESS



**Carrie Dang**

**VP, Events and Operations**





# BECOMING AN ANALYST

Complete the Analyst sign-up form (**form closes on September 30 at 11:59 pm**)

- Must sign-up using your **UofT Email Address (@mail.utoronto.ca)** and **Student Number**

Coverage Group Assignments will be announced on **September 25th**

**First Analyst meeting** will take place on September 26th, 7-8pm, FLC (KN1245)

Attend Bi-Weekly Meetings and Receive PSDP Points

**SIGN UP HERE**



# THE PSDP PROGRAM

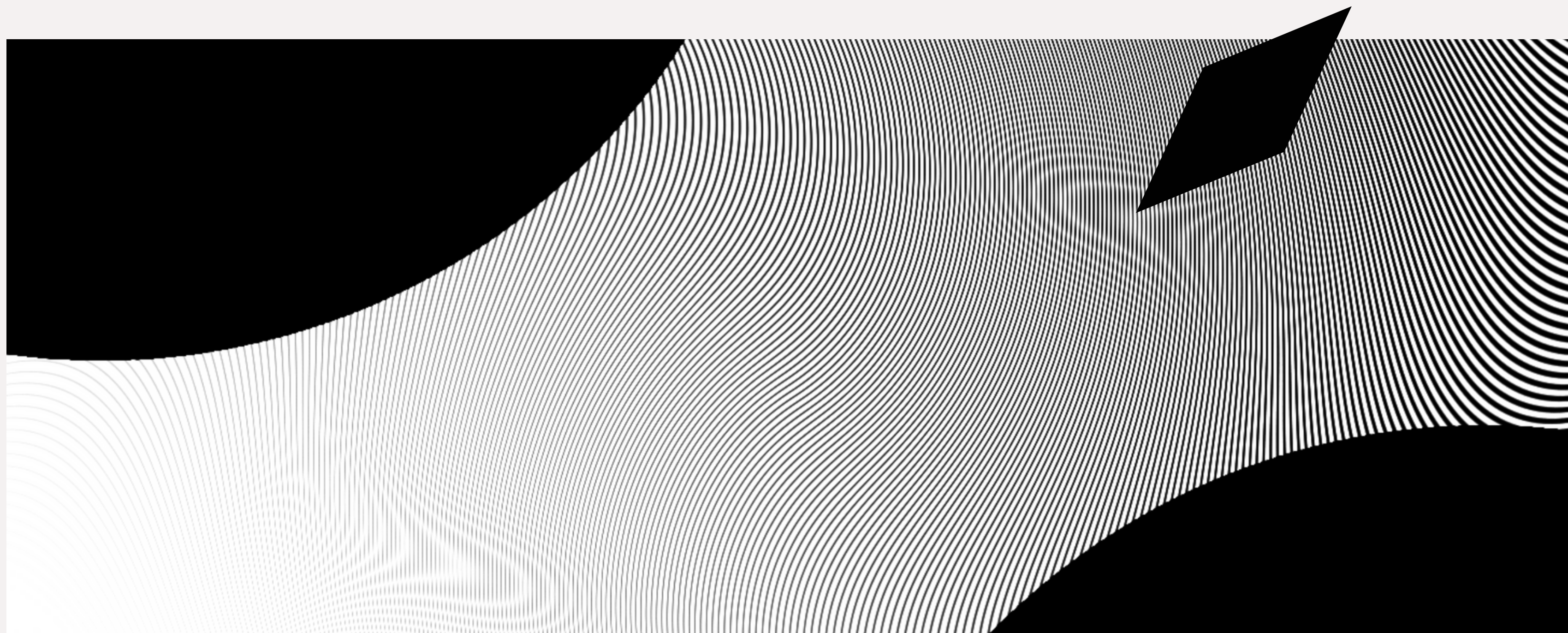
- Professional Skills Development Program  
(UTM Management & Commerce Students)
- Earn points by attending events:
  - Opening Ceremony
  - Bi-Weekly Analyst Meetings (Fall & Winter)
  - Speaker Series
  - Closing Ceremony
  - More to come!



**Scan here to learn  
more about PSDP!**



# MEET YOUR COVERAGE GROUP LEADERS







## Abailoran Almukhametov

**Year:** 4th

**Program:** Finance Specialist & Economics Major

**Coverage Group:** Technology, Media, and Telecom (TMT)

**Favourite thing about UTM Capital:** Learning through the hands-on opportunities the club provides.



## Long Nguyen

**Year:** 3rd

**Program:** Finance Specialist & Economics Major

**Coverage Group:** Power, Utilities & Infrastructure (PUI)

**Favourite thing about UTM Capital:** It's fun to work hard and hang out with people.

## Zaryab Chaudhry

**Year:** 3rd

**Program:** Financial Economics

**Coverage Group:** Power, Utilities & Infrastructure (PUI)

**Favourite thing about UTM Capital:** The people are probably my favourite! You get to network with people in your class, in a similar job, industry, or those that have done what you aim to do.



## Abdullah Al-Murab

**Year:** 3rd

**Program:** Finance Specialist & Economics Major

**Coverage Group:** Financials, Insurance, & Real Estate (FIRE)

**Favourite thing about UTM Capital:** Meeting new people and gaining memorable & rewarding experiences!



## Luca Trozzo

**Year:** 4th

**Program:** Finance Specialist & Economics Major

**Coverage Group:** Metals & Mining

**Favourite thing about UTM Capital:** The people that you get to work with over the year and seeing the final result of the team's hard work.



## Haysam Habal

**Year:** 4th

**Program:** Finance Specialist & Economics Major

**Coverage Group:** Consumer & Retail

**Favourite thing about UTM Capital:** Meeting like-minded people and having fun!



## Mohsin Ghani

**Year:** 4th

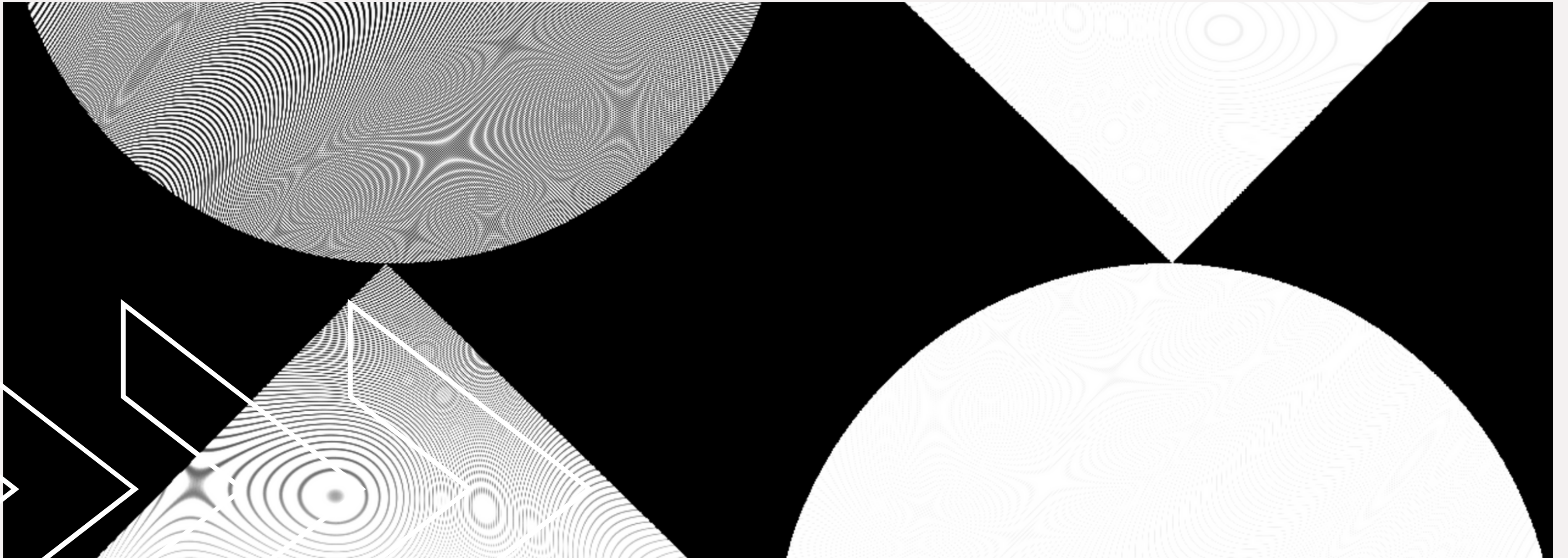
**Program:** Financial Economics

**Coverage Group:** Healthcare

**Favourite thing about UTM Capital:** Excited to learn and develop with those around me and present at the end of the year!

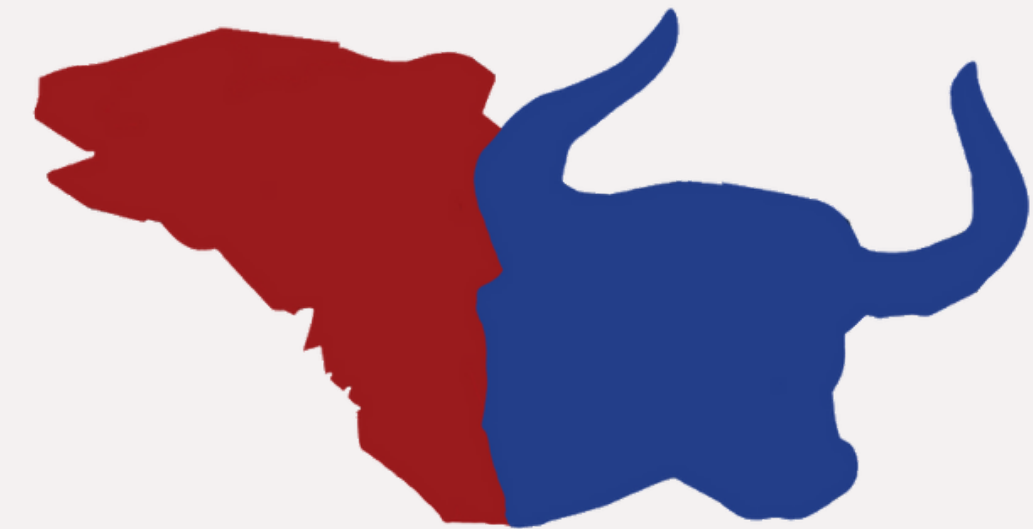


# EXEC EXPERIENCES



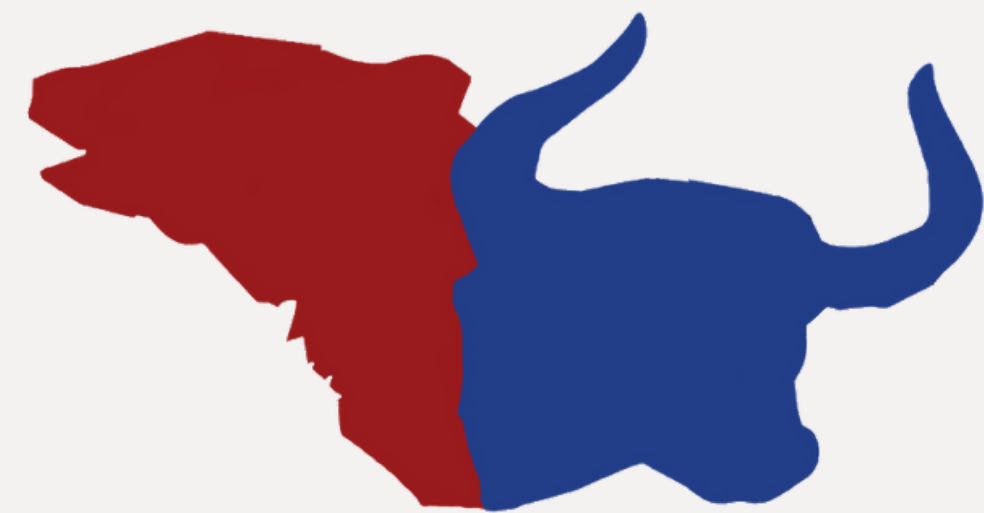


# VP MARKETING - KIM NGUYEN



UTMCAPITAL

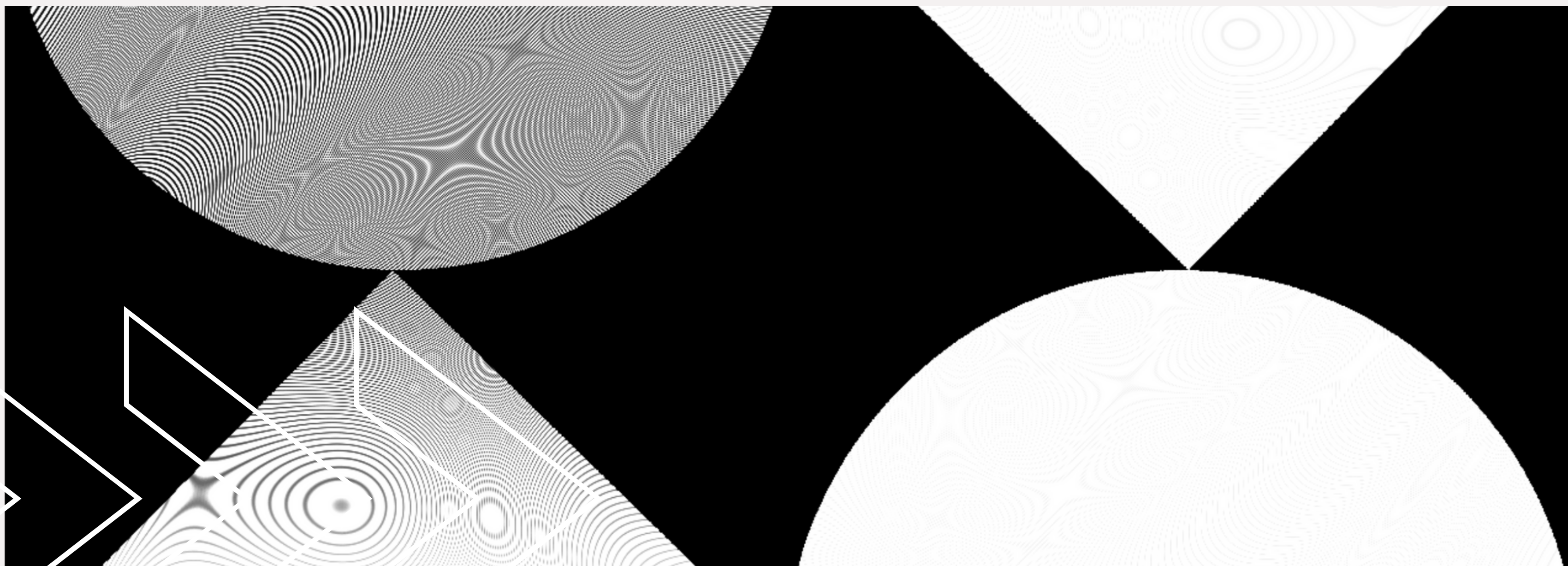
# VP FINANCE – ROY YANG



UTMCAPITAL



# UTMCAP'S ADVISOR: ED RIECKELMAN



ED'S CLOSING REMARKS



# ED RIECKELMAN

**UTM Management Adjunct Professor and Finance Executive in Residence  
President, True North Investors Inc.**



**Professor Ed has been serving as UTM Capital's Club Advisor since its inception, and is also a member of UTM Capital's Advisory Board, overseeing proposed investment recommendations to the fund.**

**Want to learn more about Ed?**



# ED RIECKELMAN'S BIOGRAPHY

Over the course of his 25-year career as a private equity investor, Ed made investments in over **20 private companies** and **was a director of 9 companies**. His private equity investments resulted in a return on invested capital in excess of 3x. He focused on investing in small and medium-sized growth companies, most of which were founder or family-owned.

He retired in January 2013. Currently, he is an **Adjunct Professor and Finance Executive in Residence in the Department of Management** at the University of Toronto Mississauga where he lectures on capital markets, equity research, M&A, and valuations. Since March 2015, he has held several advisory positions within the Kevin Murphy Group, a privately held premium global beauty care company with revenues in excess of \$125 million. Currently, he is its financial advisor reporting directly to the Chairman. He also served on the advisory board of Edge Imaging Inc., a privately held school photography business, until it was sold in the Fall of 2018.

# ED RIECKELMAN'S BIOGRAPHY

From 2009 to 2012, Ed was Vice President of Alberta Investment Management Corporation's Private Equity Group. AIMCo's PE Group had approximately \$2 billion under management with investments in both private equity funds and directly in private companies. Prior to joining AIMCo's Private Equity Group, Ed founded **True North Investors**, a private equity fund focused on acquiring middle-market companies.

From 2004 through 2007, he was a Partner with ONCAP Management Partners, Onex Corporation's dedicated middle market investment affiliate. Prior to ONCAP, Ed was a Partner with Goldner Hawn Johnson & Morrison Incorporated, a Minneapolis-based \$200 million private equity fund, and he began his career at First Chicago Corporation's Merchant Bank.

Ed is a graduate of Boston College, (BS in Finance, cum laude – top 10% of class) and holds an MBA from Carnegie Mellon University (top 15% of class).





# ED'S LECTURE SERIES

## **This Week in the Capital Markets, Mondays 6PM, KN L1220 (in-person & live webcast)**

The lecture examines the global and North American economic and political events of the past week and explores the impacts on capital markets. In addition, the lecture examines the movements in global and domestic capital markets including equity, fixed income, currency, and resources over the past week and explores the underlying drivers of these movements. Finally, the lecture highlights industries and companies that experienced unique events over the past week and discusses the events in detail.

## **Equity Research, Thursdays 5PM, KN L1220 (in-person)**

The lecture series will be divided into **two stages**. The first stage is comprised of a series of workshops during September and October, which will introduce students to equity research reports written by Equity Research Analysts. The workshops will also introduce students to research resources that reside within the FLC. Finally, the workshops will introduce students to basic financial analytical and valuation techniques. The second stage (November – April) is focused on student presentations of their individual equity research on publicly traded companies of their choice (similar to a stock pitch). Each week, with the help of the professor, a student or students will present their analysis of a company.

# CFA SOCIETY TORONTO SCHOLARSHIP

SCAN BELOW FOR MORE DETAILS



CFA Society  
Toronto

Thanks for attending UTM Capital's event.  
On behalf of CFA Society Toronto, I'd like  
to tell you more about how we can help  
you to advance your career.

ASSOCIATE STUDENT AMBASSADOR  
CURTIS CUTHBERT QUON



Connect  
with Curtis:



## SCHOLARSHIPS

3rd and 4th year students can apply for  
CFA Society Toronto's annual scholarship.  
Requirements:

- Studying Finance or Economics
- Minimum 3.0 GPA
- Application is in English
- If a 4th year: hasn't won a 3rd year  
award from CFA Society Toronto

Application Includes:

- Resume
- 500 word essay
- Unofficial Transcript

Benefits:

1. Receive up to \$3000
2. Recognized on all CFA Society  
Toronto Channels (The Analyst,  
social media, awards ceremony)

DEADLINE: NOVEMBER 19TH, 2023



## EMAIL UPDATES

CFA Society Toronto has many opportunities to  
help finance enthusiasts, sign-up for updates:



## CFA STUDY RESOURCES

Prepare for the CFA designation using Kaplan  
Schweser and receive 10% off all resources



REFERRAL NAME: CURTIS QUON

# THANK YOU



Thank you for joining us at our opening ceremony.

Enjoy some refreshments and open networking opportunities with alumni  
and club members!



**Analyst Sign-Up Form**



**FLC Workshop Sign-Up Form**



**Our Instagram**