

MERIWEST CREDIT UNION EQUITY COMPETITION

The SJSU Equity Competition is organized by MeriWest Credit Union, the Center for Banking and Financial Services at SJSU and the Silicon Valley Aggressive Growth Fund at SJSU.

The Equity Competition is a (non-credit) program that exposes participants to equity research, valuation and decision making (buy, hold or sell). The equity competition participants are mentored for up to 2 hours by investments and valuation professionals, with a final team-competition where the best performing team is awarded a trophy. In addition to the technical skills acquired in the program, participants learn about careers in investments through valuable networking opportunities.

The competition will be held in BBC 302A, Finance Lab. The competition consists of 10 minutes Power Point Presentation (max 30 slides) followed by 5 minutes of Q&A. The presentation is of a buy, hold or sell recommendation for a company meeting the following eligibility criteria – at most \$10 billion in market cap, headquartered in Silicon Valley. Power Point Presentations are due to CBFS Director 24 hours before competition. All participants will receive a certificate.

EQUITY COMPETITION DATE

November 4 at 4:30pm

LOCATION

BBC 302A, Finance Lab

ELIGIBILITY AND APPLICATION

Undergraduate students: Finance, Corporate Accounting & Finance, and Accounting concentrations

Graduate students: MSFA, MBA and MSA

Eligible students must have already successfully completed at least one undergraduate-level finance course.

APPLICATION DEADLINE

Friday, October 03, 12:00 PM (noon)

APPLICATION PROCESS

Please email the following documents to CBFS Director Dr. Stoyu I. Ivanov at stoyu.ivanov@sjsu.edu:

- Resume
- Unofficial transcripts (for graduate students both undergraduate and graduate transcripts are required)
- (Optional) – Personal statement: How can the Equity Competition help you in achieving your educational and professional objectives? (max 350 words)

Visit the Center for Banking and Financial Services website for more information: sjsu.edu/cob/cbfs

SCHOLARSHIPS

Members of the winning team will receive individual scholarships.

CERTIFICATE REQUIREMENTS

In order to qualify for the Equity Competition Certificate a student must present their buy, hold or sell recommendation to the judges as part of their team.