



Home » **Student investors place in national competitions**

[< Previous](#) [Next >](#)



SECTIONS

> [ACADEMICS](#)

> [CAMPUS & COMMUNITY](#)

> [RESEARCH](#)

> [ALUMNI](#)

> [PRESS RELEASES](#)

> [FEATURED VIDEOS](#)

NEWS SOURCES

> [Fresno State Magazine](#)



Student investors place in national competitions

Nineteen students from Fresno State’s Craig School of Business’ [Student Investment Fund Class](#) (FIN 129) placed at two national conferences in April, based on the performance of their \$1.41 million dollar investment portfolio. They placed third and fourth in the Growth Investment category at the

2013 Global Asset Management Education (GAME) Conference in New York City and fourth and fifth at the Redefining Investment Strategy Education (RISE) Conference in Dayton, Ohio.

The competitions were based on the ratio of the 2012 return, divided by the risk of the portfolio. The Fresno State group was competing against 240 student-managed portfolios in five categories: Value, Blend, Growth, Alternatives and Fixed Income.

In October 2010, the Fresno State Foundation allocated \$1 million to the Student Managed Investment Fund Program as part of its endowment portfolio for large-cap stocks. Since then, students have steadily increased the funds. Their return in 2012 was 15.82 percent and as of May 8, 2013, their return since inception was 41.21 percent (vs. 38.01 percent for the S&P 500 Index), with a market value of \$1.41 million.

“Our mandated mission is to invest in large-cap stocks with a growth potential and an ability to increase dividend, using both fundamental analysis and technical analysis,” said Dr. K.C. Chen, Chair, Department of Finance and Business Law at Fresno State. “Our benchmark is the S&P 500 Index. Currently, our five largest holdings are Microsoft, Whole Foods Market, Wyndham Worldwide Corp., Direct TV and Nike.”

Student managers include Rowena Alfonso, Marisa Bejarano, Joshua Carouso, Joe Cha, Miguel Contreras, Jr., Michelle Doan Vu, Karina Fernandez, Esteban Gonzales, Nicholas Johns, Jonathan Lopez, Daniel Maldonado, Sonee Denise Neely, Peter Netzley, Michael Newell, Jason Albert, Weii Joon Soo, Jason Robert Tarvin, Nicholas Urgesi and Stephen Velo.

Fresno State’s Student Managed Investment Fund Program was established in 1998 to offer students hands-on investment management experience to complement their academic objectives, and represents a collaborative effort between the Craig School of Business and the Fresno State Foundation.

Related Link:

- [Student Managed Investment Fund](#)

By [FSNArchive](#) | May 10th, 2013 | Categories: [PRESS RELEASES](#) | Tags: [Academics](#), [awards and recognition](#), [Business](#), [students](#) | [Comments Off](#)

[> Community Newsletter](#)

[> Fresno State](#)

[> The Collegian](#)

[> Bulldog Blog](#)

[> Go Bulldogs](#)

[> Videos](#)

[> Social Media Directory](#)

Share This Story, Choose Your Platform!



Related Posts

New semi truck emissions testing program opens on campus

February 1st, 2024

Historic winter expedition highlighted in 'Sierra Odyssey' movie premiere

January 30th, 2024

Fresno State holds blood drive

January 30th, 2024

Community service opportunities fair planned

January 30th, 2024

Grant propels Journalists of Color training program

January 30th, 2024

CONTACT US

Fresno State News Hub is the primary source of information about current events affecting California State University, Fresno, its students, faculty and staff; providing an archive of news articles, videos and photos, as well as links to major resources on campus as a service to the university community.

CALIFORNIA STATE UNIVERSITY,
FRESNO
5241 N. Maple Ave.
Fresno, CA 93740
P: 559.278.4240

Email Us

SECTIONS

- > [ACADEMICS](#)
- > [CAMPUS & COMMUNITY](#)
- > [RESEARCH](#)
- > [ALUMNI](#)
- > [PRESS RELEASES](#)
- > [FEATURED VIDEOS](#)

Sign up for the Community Newsletter

Fresno State News Archives

