

FINA 7397 APPLIED EQUITY FUND MANAGEMENT

Students in the **Applied Equity Fund Management** courses are security analysts and portfolio managers for the [Cougar Investment Fund](#), a multi-million dollar private equity fund. The objective of the fund is to identify and invest in stocks whose market prices are below intrinsic value, while maintaining a risk exposure roughly equivalent to that of a broad market index. As analysts and portfolio management teams, students will build valuation models, make security selections, monitor compliance with fund objectives and perform the accounting and reporting duties necessary in the management of an equity mutual fund. This experience will require that students synthesize and apply all the main skills covered in the other graduate courses in Finance. Class meetings often involve lecture material or speakers. Students should therefore plan for significant outside time to be spent on work for the Fund.

Application Procedure for the Cougar Investment Fund

Application materials must be submitted to Dr. Thomas George in the Finance Department by March 31 of the calendar year in which admission is sought. Decisions will be made in early April. Enrollment will be limited to 16 students. Course prerequisites are completion of FINA 6A35 and FINA 7A10.