

# **KSU Student Managed Investment Fund ( KSU SMIF)**

## **2022 Calendar Year Activities & Accomplishments**

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The KSU Student Managed Investment Fund (KSU SMIF) was founded with the intent of helping undergraduate students in honing their training in the investment field, building a bridge from the classroom to their careers and developing leadership skills. In 2008, KSU SMIF received an endowment of \$100,000 from Henssler Financial Services and was established as an LLC. After compliance testing, KSU SMIF LLC made its first trade in 2010. KSU SMIF LLC model is unique, as most other SMIFs are regular courses that students are required to take. This allows our students to develop leadership skills, be more selective in its membership, as well as operate with a student driven peer to peer training model. The KSU SMIF is primarily student managed and peer trained, under the guidance of our faculty adviser/chair and the professors on our board of directors that oversee and guide our decisions and our panel of industry advisers. As of December 2022, KSU SMIF LLC had \$329,000 in assets under management, representing a 229% total return on investment since the initial investment back in 2010.

In addition to the numerous international, national competitions that we have won, the KSU SMIF is proud of its graduate placement which includes but

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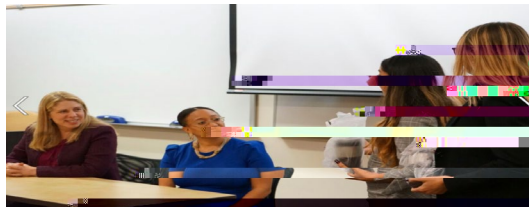
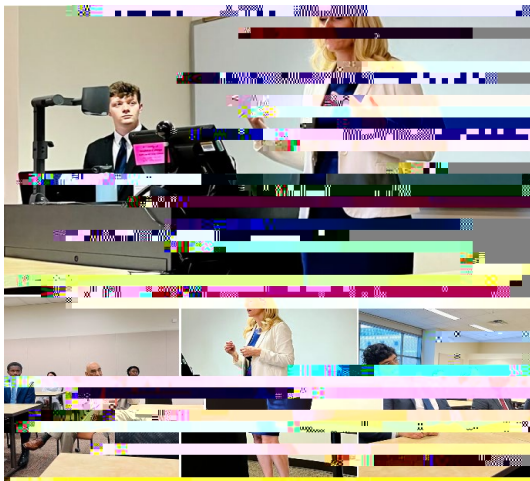
<b>SMIFC</b>	Amitai Ilan, Eric McCart, Cain Beatty, and Mambaye Diagne (Faculty Advisor-Dr. Hariharan) represented Kennesaw State University for its second appearance at the SMIF Consortium. The SMIFC conference took place in Chicago and featured many industry professionals and top academics. KSU's team participated in the portfolio and research paper challenge. The poster competition judged both a poster board, which portrayed SMIF's investment philosophy, as well as the performance of the SMIF portfolio over the past year. KSU placed second in both competitions beating out over 20 other schools.
<b>CFA Ethics Challenge</b>	KSU SMIF team of Hudson Anderson, Luke Aumer, Katty Hernandez, Andrew Olson and Justin Waters (Faculty Advisor- Dr. Hariharan) put forth a very strong performance (unsolicited comments from key attendees). KSU placed 2nd in the CFA Ethics Challenge.

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## Career Conversations with Industry Leaders

In Spring 2022, [redacted] was honored to have Stephanie Lang, CFA® speak to the fund in Spring 2022 on her career in leading the portfolio/investment teams and funds for a wealth management firm. Ms. Lang is the Chief Investment Officer at Homrich Berg in Atlanta, Georgia.

In Fall 2022, [redacted] was honored to host Nora Bryant and Rhonda Potter, CFA®, CFP®







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in person.

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