



smartwomansecurities

September 24, 2010

# Welcome!

## Fall 2010 Kickoff

According to a 2005 survey from Oppenheimer Funds, 76% of women wish that they had learned more about money and investing growing up, yet only 30% say they teach their children about investing.



# *Who are we?*

- **Rachelle Morris '12**
  - Major: Engineering
- **Ting Ting Liu '12**
  - Major: Neuroscience, Economics
- **Anoosha Reddy '12**
  - Major: Economics, International Studies and German Minors
- **Remy Dikeou '12**
  - Major: Romance Languages
- **Alix Peabody '12**
  - Major: Mathematics
- **There are currently SWS chapters at:**  
Harvard      Yale      Columbia      Dartmouth      Princeton  
Cornell                      Boston College                      Fordham



# What is Smart Woman Securities?



# Our Purpose

- Smart Woman Securities is a not-for-profit organization focused on *investment education for undergraduate women*, by giving them the skills to manage an investment portfolio, handle risk, and take responsibility for their financial decisions.
- We plan to teach women about investment through instructive seminars, mentoring, and hands-on investing
- Our goal is to provide you with resources (the people, environment, curriculum, money) you need to understand and practice investing



# Education

- Eight weekly seminars taught by Tuck faculty, MBA students, and industry professionals
- Designed to be interactive!
- Students will learn investment basics, gain knowledge about the markets, develop analytical and research skills, and learn about the SWS investing principles
- Investment Project to conclude Seminar Series



# Seminar Schedule

## Personal Finance

- Seminar 1 – Personal Finance, Saving, and Investing
- Seminar 2 – Understanding the Stock Market

## Finding and Researching Stocks and Qualitative Analysis

- Seminar 3 – Finding and Researching Investment Ideas
- Seminar 4 – Analyzing Companies and Industries

## Financial Statement Analysis and Coming to an Investment Recommendation

- Seminar 5 – Understanding Financial Statements I
- Seminar 6 – Understanding Financial Statements II
- Seminar 7 – Evaluating Companies with Financial Metrics
- Seminar 8 – Creating an Investment Recommendation



# Attendance and Expectations

- You **MUST** attend six of the eight seminars to become an “SWS Associate” (basically full-fledged member!)
- If absent, you need to go over the presentation on your own and complete the quiz on your own
- As an associate you have to opportunity to join an investment research team as an analyst





# Mentoring Initiative

- Partnership with J.P. Morgan
  - Chapter Mentor: Larissa Goodwin
  - Apply for an individual mentor by **Sept. 27**
  - Trip to J.P. Morgan, NYC on Oct. 22
- Work with the Tuck–Dartmouth Club and Tuck Women in Business
- Contacts through the Dartmouth Entrepreneurial Network and Alumni Network



# Non-Profit

- Since SWS is not-for-profit, the money we make from our investments will either...
  - 1) Directly cycle back into the club's future investments
  - 2) If we are substantially in the green, donated to a charity of our choice



# Looking Ahead

- Become an associate and apply to be on the Investment Board
- Help fundraise to support the Investment Fund
- Join a research team, learn about the specified industry and choose 1-2 companies that look promising within that industry to research in depth
  - Formally present your ideas to the Investment Board, who ultimately chooses in which companies to invest the club's money



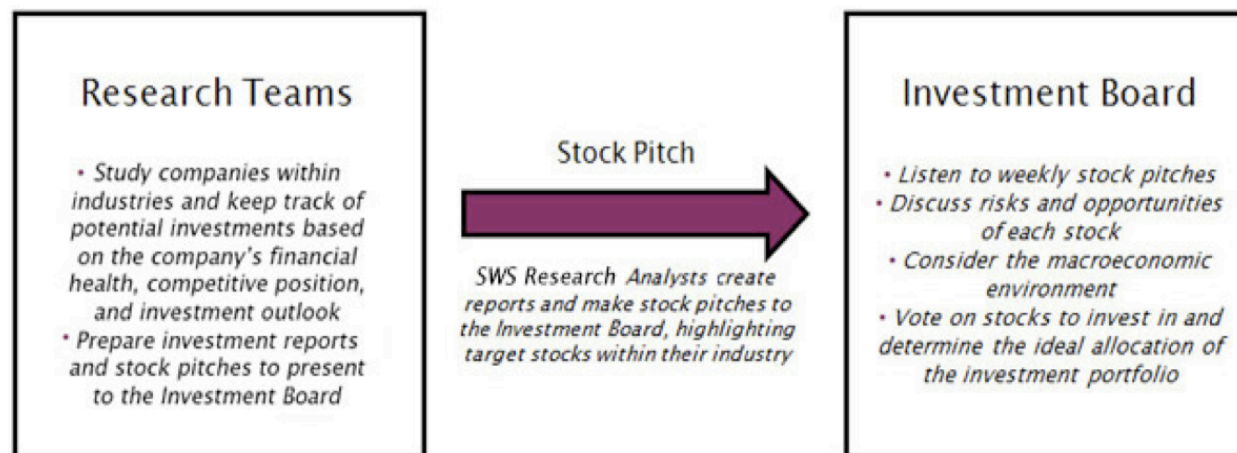
# Research Teams

- Students will be placed into five teams of four or five girls each
- Each team will cover a different industry (e.g. consumer, technology, healthcare, media and entertainment, etc.)
- You will set up meeting times to research your companies in teams
- Each team will present **stock pitches** to the **Investment Board**

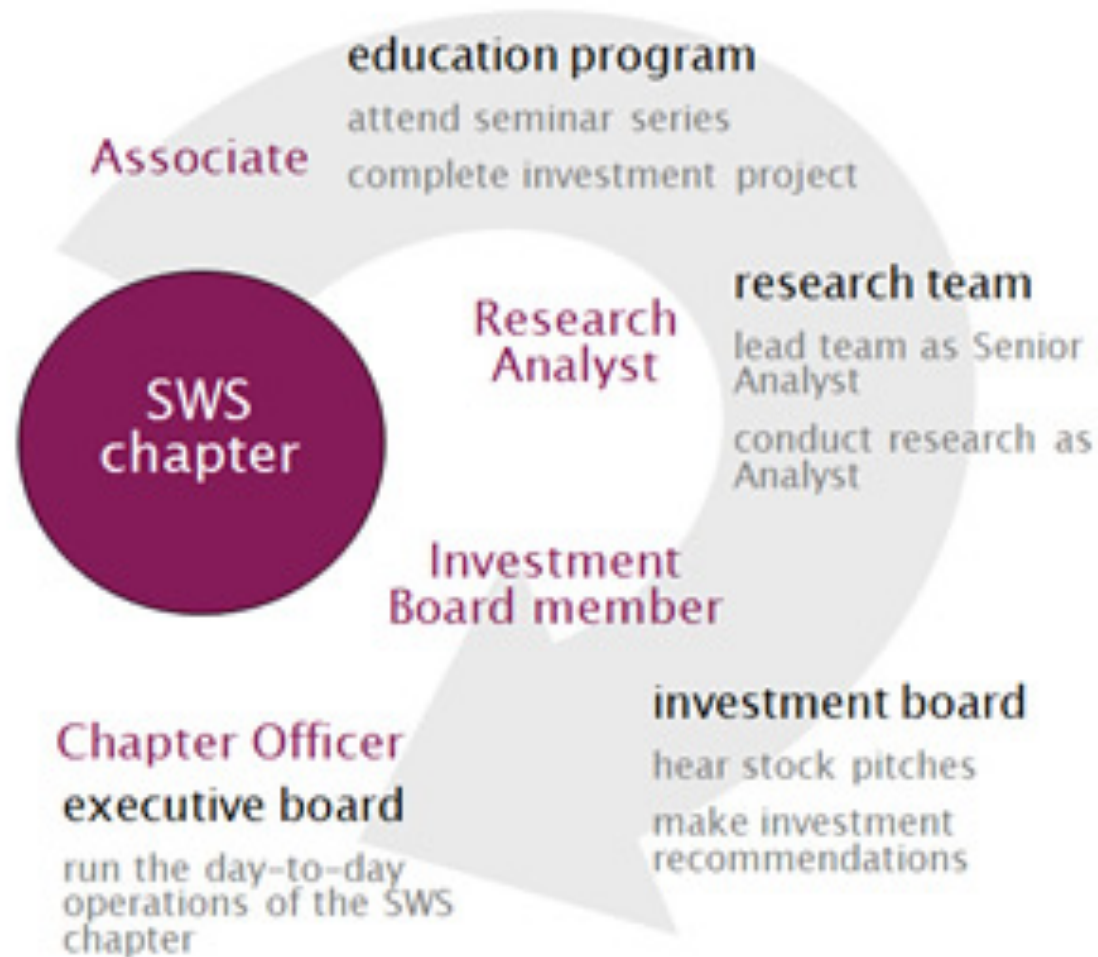


# Stock Pitch

- Analysis and presentation includes research on industry background, market position, financial analysis, operations overview, and a variety of other details regarding the company



# Looking Ahead



# The Oracle of Omaha

- Trip to meet **Warren Buffett**, CEO of Berkshire Hathaway, in Omaha, Nebraska with other chapters of SWS



# Join us!

- A community of intelligent and ambitious young women (self-call)
- We are dealing with **real companies** and **real money**, watching real-life investments **grow**.
- The entire point of this process is to learn, outside the classroom in an interactive and social environment
- You can take what you learn and apply it to your own investments and life, now and in the future





# Specific questions or concerns?

- Rachelle Morris
- Ting Ting Liu
- Anoosha Reddy
- Remy Dikeou
- Alix Peabody
  
- Blitz SWS or Smart Woman Securities



THANK YOU!

