



McGill Investment Club

McGill Investment Club

2023-2024 Academic Year

September 8th, 2023



Today's Presentation

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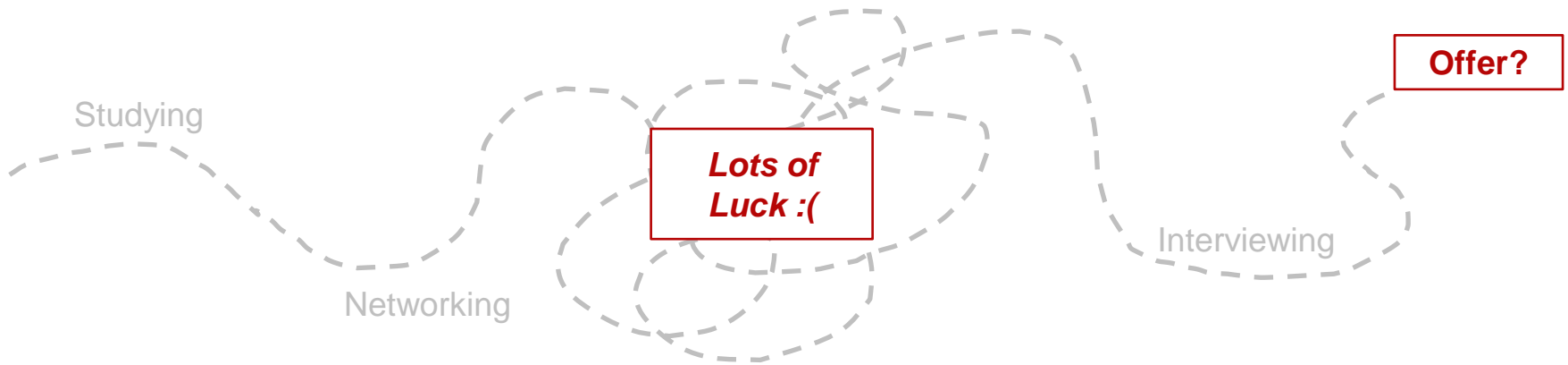
1. Club Overview



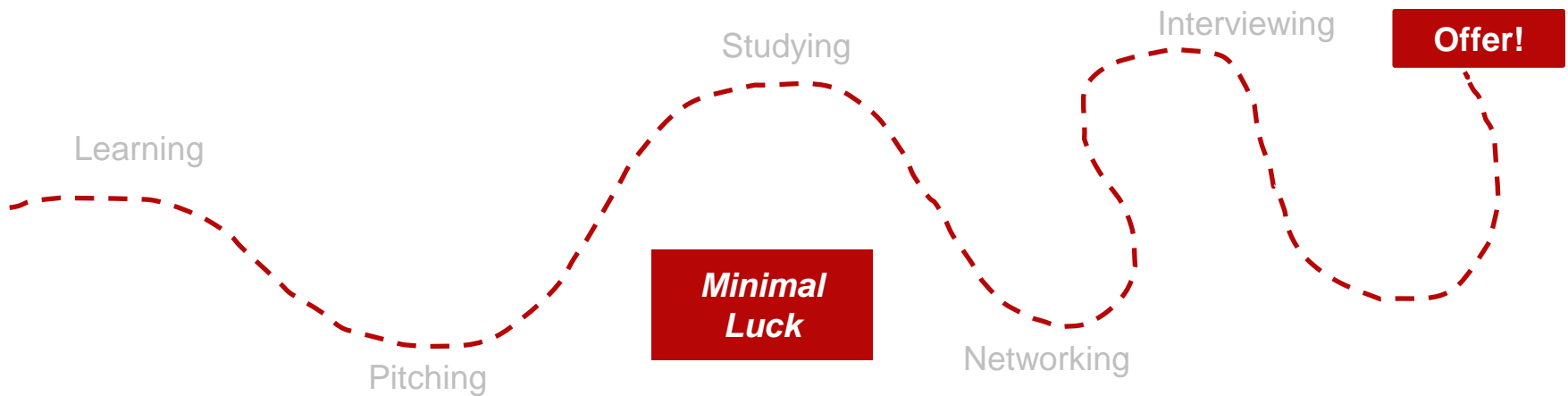
Club Overview

Our Purpose

Typical Finance Recruiting Path



Optimal Finance Recruiting Path



Club Overview

Our Purpose

Typical Finance Recruiting Path



Optimal Finance Recruiting Path



Club Overview

About the MIC

About Us

- The McGill Investment Club (“MIC”) is McGill’s largest comprehensive student-run investment organization
- The MIC aims to bridge the gap between the classroom and the financial workplace
- At the core, we proudly support the career preparation and investment education of McGill’s best and brightest students
- The Investment Committee (“IC”) is the core mandate of the club; however, the MIC also maintains a strong commitment to its various external events, such as the Global Stock Pitch Competition and Toronto and Montreal Finance Conventions

Our Offerings

6x
Club of the Year

30+
Years of History

40%
Female-Identifying
Members

650+
Active Members

Alumni Placements



The MIC is the largest undergraduate club at McGill with over 650 active members

Club Overview

Our Team

CO-PRESIDENTS



Cooper Koreen

Morgan Stanley, Toronto



George Cantoni

Moelis, New York

SENIOR EXECUTIVES



Afton Wylynko

Evercore, Houston



Aidan Bergin

Evercore, Houston



Guillaume Carlesso

Evercore, Houston



Vansh Juneja

TD Securities, Toronto



Wenhan Hu

Whitehorse, Toronto

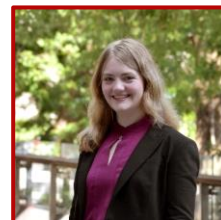
JUNIOR EXECUTIVES



Ishaan Kamra



Elisa Bonnet



Katherine Lake



















Will Betik

2. Our Initiatives



Our Initiatives

Getting Involved

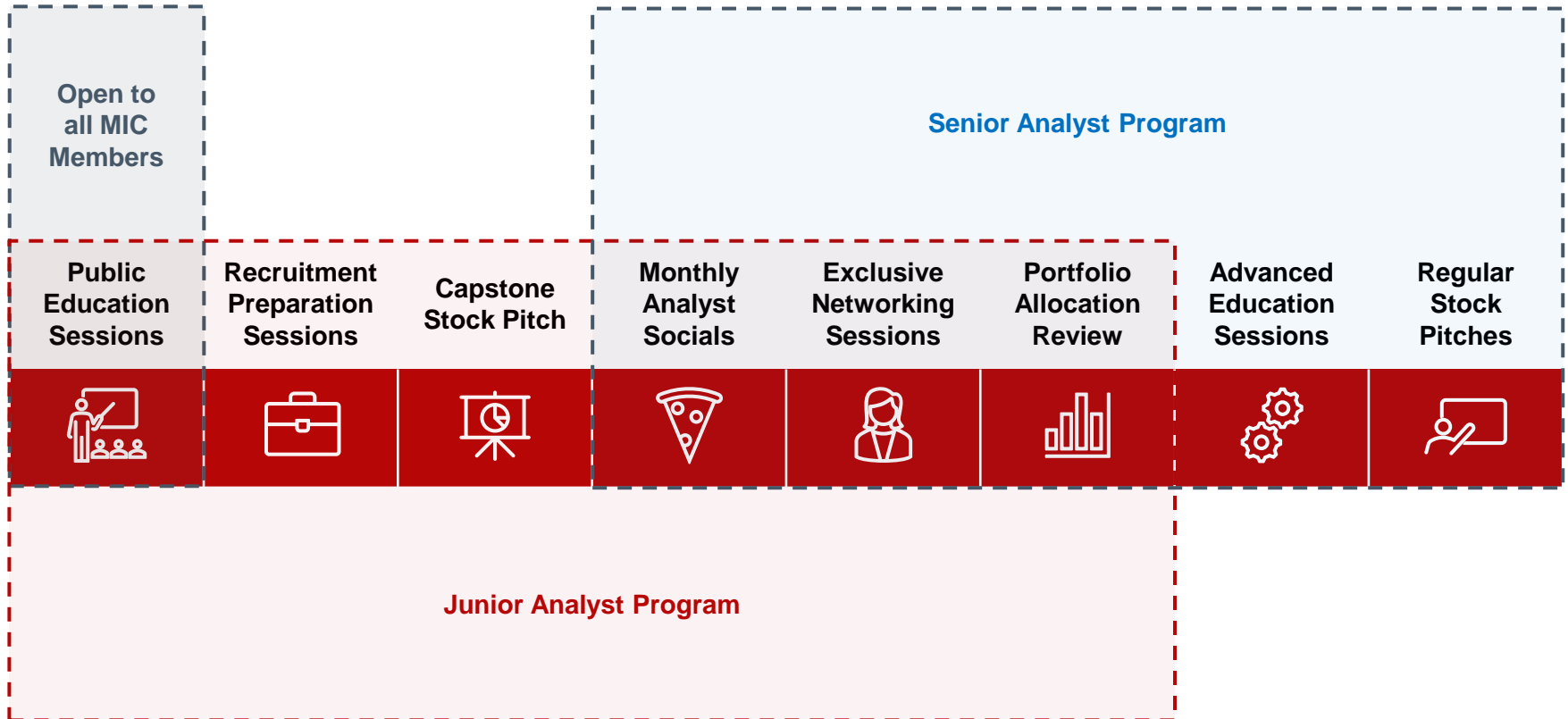
	Description	Timeline	Time Commitment	Select Partners
INVESTMENT COMMITTEE	As the core mandate of the club, the Investment Committee offers students an in-depth investing curriculum along with one-on-one tailored recruiting mentorship to support career development	All Year	Must attend and participate in all events	   
WIF CONVENTION	The Women in Finance convention connects ambitious female students, professionals, and leaders through guest speakers, workshops, and networking events	Fall 2023	Must attend and participate in all events	    
TOFC / MOFC	The Toronto and Montreal Finance Conventions are the MIC's flagship recruitment events as members prepare for the 2025 recruitment cycle	Winter 2024	Must attend and participate in all events	   
GLOBAL STOCK PITCH	The Global Stock Pitch competition is designed to showcase students' financial skills globally with themes that are unexplored in typical classrooms	Winter 2024	Must Attend	  

3. Investment Committee



Investment Committee

Programming Structure



The Investment Committee is the core mandate of the McGill Investment Club

Investment Committee

Educational Sessions

Public Education Curriculum

1

Industry Analysis

Breaking down economic moats, cost structures, and competitive dynamics

2

Business Analysis

Identifying qualities, risks, and catalysts of good businesses, management teams, and operations

3

Thesis Development

Generating and communicating differentiated views from the market with valid justification

4

Financial Statement Analysis

Common-size, ratio and multiple analysis over time and across industries

5

Valuation

Building out 3-statement models, discounted cash flow analyses, and comps from scratch

Investment Committee Education



Aidan Bergin

Public Education Sessions and Junior Analyst Sessions

- With prior experience in private equity and personal interest in fields such as distressed debt, Aidan is passionate about teaching the next generation of McGill students the ins and outs of stock pitching and investing. He will be running Public Education Sessions, open to all interested students regardless of major or graduating year, as well as Junior Analyst Sessions



Vansh Juneja

Senior Analyst Sessions

- Having worked in private equity and investment banking, as well as competing in a number of stock pitch competitions, Vansh is well-versed in topics such as idea generation and financial modelling. He will be running Senior Analyst sessions, designed specifically for students which have mastered the basics and are looking towards advanced topics

Investment Committee Mock Portfolio



Guillaume Carlesso



Wenhan Hu

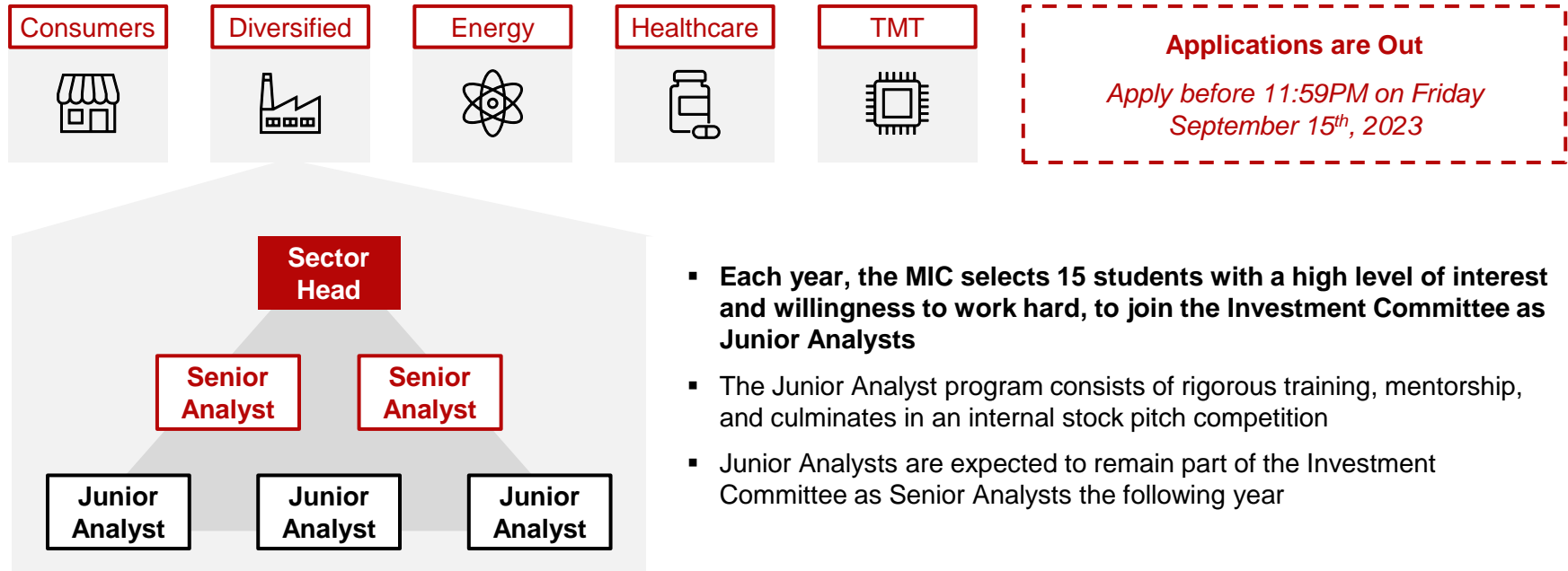
Portfolio Management

- Jointly, Guillaume and Wenhan have experience in investment banking, private equity, ESG investing, and venture capital. They will be building out a portfolio as a new continuity vehicle under the Investment Committee this year

Investment Committee

Junior Analyst Program Overview

Junior Analyst Program Structure



- Each year, the MIC selects 15 students with a high level of interest and willingness to work hard, to join the Investment Committee as Junior Analysts
- The Junior Analyst program consists of rigorous training, mentorship, and culminates in an internal stock pitch competition
- Junior Analysts are expected to remain part of the Investment Committee as Senior Analysts the following year

2022-2023 Partnering Firms

ALTA S

Bloomberg

 **Desjardins**

 **Fidelity**
INVESTMENTS

Moelis

ONEX

 **Point 72**

Exclusive Networking Sessions



Desjardins Networking Cocktail

Junior Analysts are given the exclusive opportunity to network with Investment Committee partner firms, alongside an array of other recruitment and networking events reserved for students in the program

Investment Committee

History of Success

Sector Heads

Consumers	Diversified	Energy		Healthcare	TMT
					
Julian Robinson	Luca D'Alessandro	Afton Wylynko	Guillaume Carlesso	George Cantoni	Vansh Juneja
					

Historical Analyst Summer Placements

2021						
2022						
2023						 
2024						

The Investment Committee has a demonstrated history of recruitment success, and is led by some of the brightest junior and senior finance students at McGill

Investment Committee

History of Success

2022-2023 Select Junior Analyst Placements

ALTAS

Summer 2024



BANK OF AMERICA

Summer 2024



BMO Capital Markets

Summer 2023



Summer 2024



Summer 2023



Summer 2024



Summer 2024



Summer 2024



Summer 2024



Summer 2023



Summer 2024

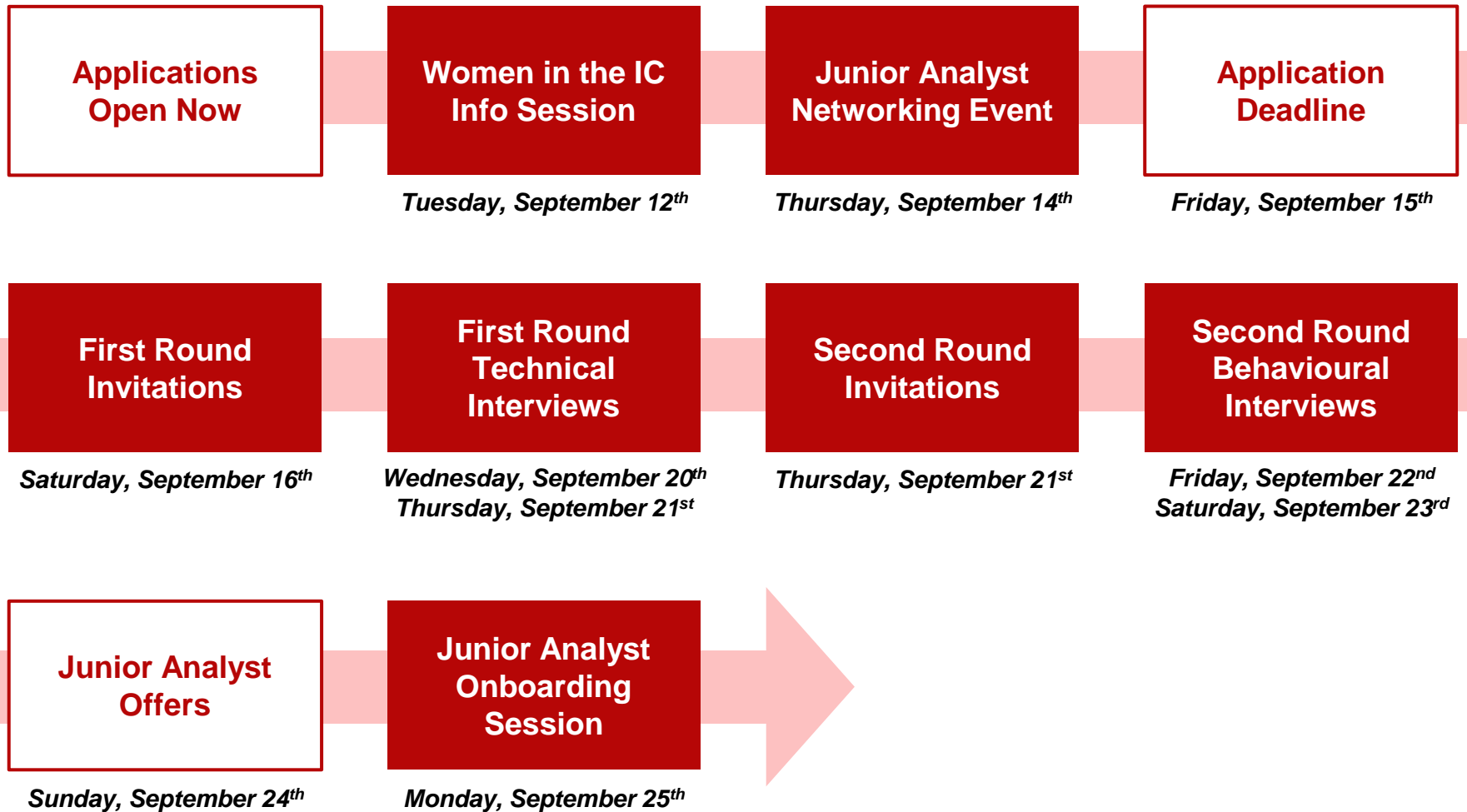


Summer 2024

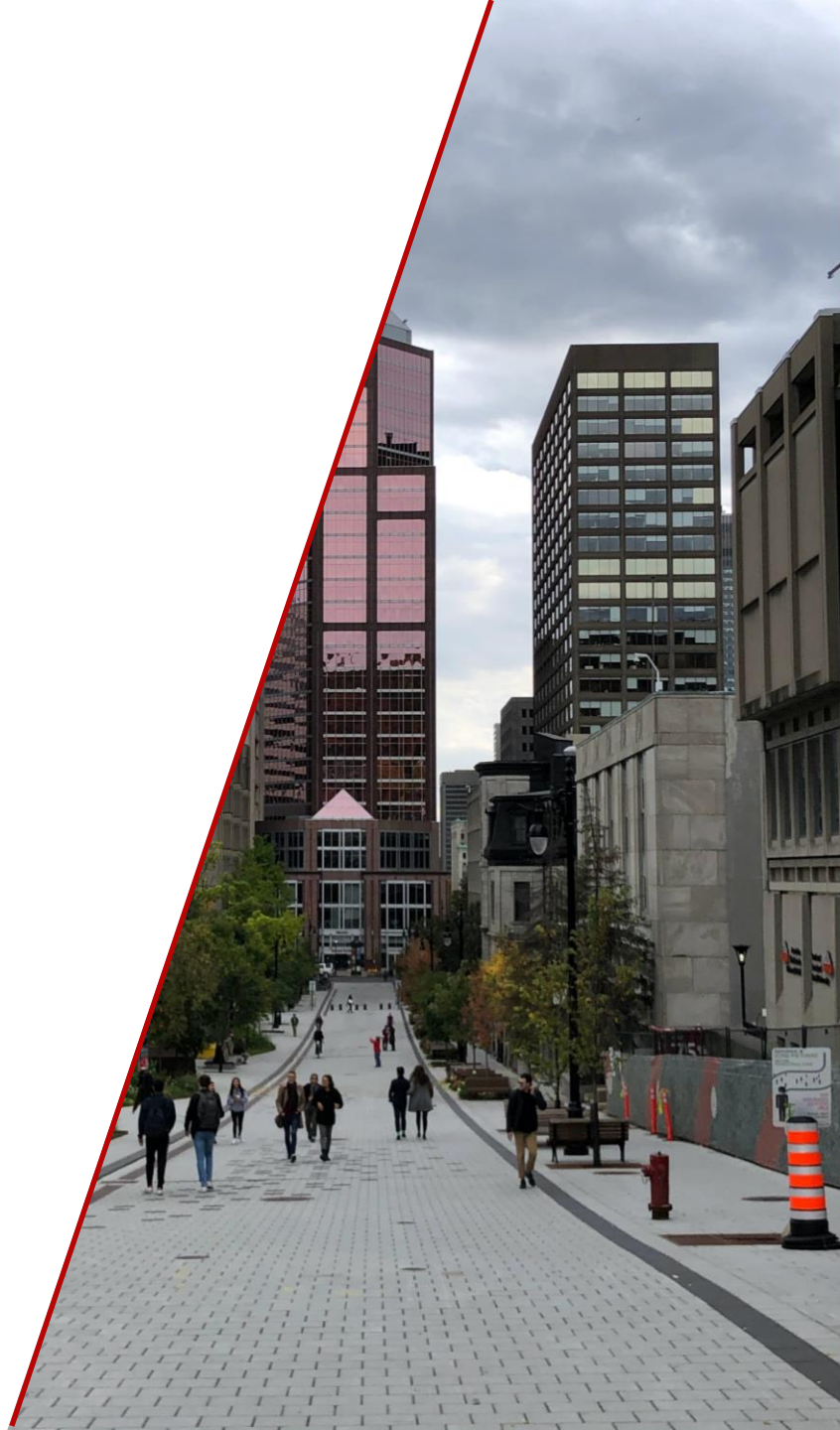
Last year's Junior Analyst class placed at some of the leading firms across the capital markets for their freshman and sophomore summer internships

Investment Committee

Junior Analyst Recruitment Timeline



4. Women in Finance Convention



Women in Finance Convention

Event Overview

About the Women in Finance Convention

- This year marks the second edition of the Women in Finance Convention (“WIF”)
- The event is spread across three days and includes: firm information sessions, workshops, senior leadership panels, networking luncheons, and fireside chats
- Opportunity for women to connect with other ambitious students, professionals, and leaders, with several guest speakers, workshops, and networking events
- Connects female students and professionals in-person, helping build out the female finance community at McGill and teaches students the skills needed to succeed in the world of finance
- Last year, the event included 50 delegates and 9 partnering firms

2022 WIF Convention Photos

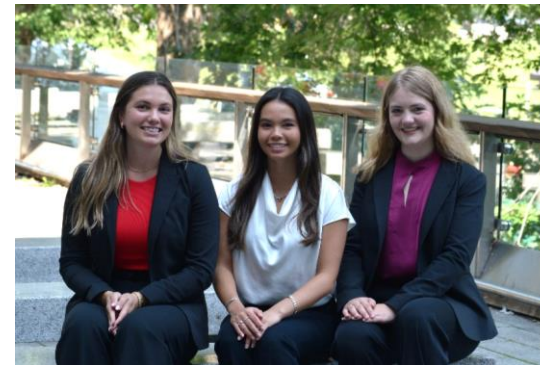


WIF Convention 2022 Day 2, Lunch



WIF Convention 2022 Day 2, BMO Session

2023-2024 Organizing Committee



Afton Wylynko, Elisa Bonnet, Katherine Lake

2022-2023 Partnering Firms



Awarded the *MUS Conference of the Year* following its inaugural edition

Women in Finance Convention

Event Overview

Convention Delegates

- **Opportunity:** Selecting a delegate cohort of 50 female identifying students to attend the three-day convention
- **Responsibilities:** Attend entirety of the convention, engage in open Q&A, and build relationships with fellow delegates and sponsors
- **Applications:** Opportunity open to students of all years (with preference to U0s-U2s), encouraging students from all faculties to apply. No prior finance experience required

A

October 23rd, 2023

Delegate Applications Open

B

November 5th, 2023

Delegate Application Deadline

C

November 22nd, 2023 – November 23rd, 2023

WIF Convention (In-Person) at the McGill Faculty Club

D

Friday November 24th, 2023

WIF Convention (Online)

Coordinators

- **Opportunity:** Looking for 2-4 students to help plan event logistics, market event, design messaging, etc.
- **Responsibilities:** Attend weekly meetings, aid in event promotional efforts, organize delegates during convention
- **Applications:** Opportunity open to U0 & U1 students, encouraging students from all faculties to apply. Prior event planning experience considered an asset

A

September 18th, 2023

Coordinator Applications Open

B

September 29th, 2023

Coordinator Application Deadline

C

October 15th, 2023

Planning Lunch + Promotional Photos

D

November 22nd, 2023 – November 23rd, 2023

WIF Convention (In-Person) at the McGill Faculty Club

E

November 24th, 2023

WIF Convention (Online)

The Women in Finance Convention connects ambitious female students, professionals, and leaders through guest speakers, workshops, and networking events

5. Toronto Finance Convention / Montreal Finance Convention



Toronto Finance Convention / Montreal Finance Convention

Event Overviews

Convention Overviews

- The Toronto Finance Convention (“TOFC”) and Montreal Finance Convention (“MOFC”) are the MIC’s flagship recruitment conventions
- Students meet alumni and representatives from firms through a variety of events, ranging from office tours and information sessions to networking cocktails and meals
- They are a prime opportunity for students and firms to form connections ahead of recruiting cycles, and offer participants the opportunities to ask questions

Our History



2015



2019



2022

- This year marks our 16th annual TOFC and 17th annual MOFC, having been inceptioned in 2007 and 2008, respectively
- Our conventions have provided students a consistent pathway to recruit at top firms in Canada
- Over the years, the conventions have significantly helped students land internships and full-time offers

2022-2023 TOFC & MOFC Photos

Firm Tours



Networking Meals



2022-2023 Partnering Firms



The Toronto and Montreal Finance Conventions are geared towards students entering the summer 2025 recruitment cycle

6. Global Stock Pitch Competition



Global Stock Pitch Competition

Event Overview

Competition Overview

- The MIC's Global Stock Pitch Competition is one of the largest of its kind in North America, with teams of 1-4 will competing for a prize pool of \$7,500
- The competition is open to all undergraduate students worldwide, with 25 teams ultimately selected to compete in the event's semi finals, and 5 finalists progressing to the final round
- The event concludes with a speaker panel with representatives from our sponsors, which included:

JARISLOWSKY FRASER
GLOBAL INVESTMENT MANAGEMENT

Morgan Stanley



Scotiabank
GLOBAL BANKING AND MARKETS

WARBURG PINCUS

Why the Global Stock Pitch?

- 1 Explore **exciting, hands-on topics** in finance that extend beyond the classroom while crafting your pitch with your peers
- 2 Receive feedback from leading industry professionals representing **major financial institutions** on your presentation
- 3 Hear from industry-leading practitioners during our **panel speaker event** and learn valuable insight across various themes
- 4 **Network and compete** with like-minded students who all share a passion for stock pitching and capital markets

Past Judging Firms



Blackstone

CPP Investments

EVERCORE

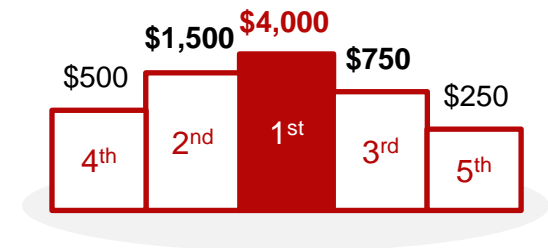
Jefferies

J.P.Morgan



SoftBank Group

Finalist Prize Pool



- Best First Year Team (**\$100**)
- Best Female Speaker (**\$100**)
- Best Formatting (**\$100**)
- Best Speaker (**\$100**)
- Best Inter-School Team (**\$100**)

7. How to Get Involved



Ways to Get Involved

Variable Commitment Options

Become a Member

- No weekly meetings, instead you can pick and choose the events that you want attend
- Membership costs \$15 and can be purchased online on the MIC website

Throughout the Year

Event Coordinator Recruitment

- Excellent way to prove that you can be a great MIC Executive

1 Women in Finance Convention Coordinators

2 Global Stock Pitch Coordinators

Depending on the Event

Investment Committee Recruitment

- The Investment Committee is the highest level of involvement and offers rigorous finance education
- Paired with one-on-one mentorship, the IC helps members secure internships and careers in the capital markets

Due September 15th, 2023



Contact Information

Our Executive Team

Co-Presidents



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