



McGill Investment Club

Global Stock Pitch Competition

2024 Information Session

February 25th, 2024

www.mcgillinvestmentclub.ca



Today's Presentation

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1. About Us



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%

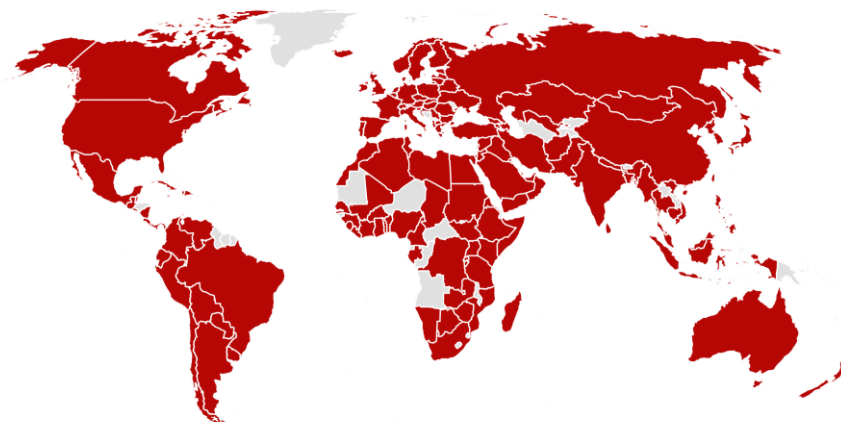
Female-Identifying
Members

700+

Active Members

Our Global Presence

- Situated at a university with one of the **most diverse student** bodies in the world, the MIC leverages its international presence to bring together the world’s brightest students entering the world of finance
- Our global presence is best exhibited by our Global Stock Pitch Competition, which last year boasted:
 - **215+ student delegates**
 - **45+ university competitors**
 - **15+ countries represented**



McGill’s 2023-24 student body hails from over 155 countries

Club Overview

Our Team

2023-24 Executive Team



Cooper Koreen

Co-President



George Cantoni

Co-President



Afton Wylenko

Senior Executive



Aidan Bergin

Senior Executive



Guillaume Carlesso

Senior Executive



Vansh Juneja

Senior Executive



Wenhan Hu

Senior Executive



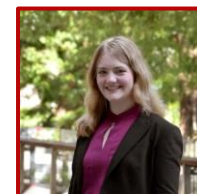
Elisa Bonnet

Junior Executive



Ishaan Kamra

Junior Executive



Katherine Lake

Junior Executive



Will Betik

Junior Executive

Stock Pitch Competition Coordinators



Claire O'Leary

Coordinator



**Finlay
Charlesworth**

Coordinator



**Florence
Dolan Leclair**

Coordinator



Jasmine Ma

Coordinator



Lara Collins

Coordinator



Lucy Kolde

Coordinator

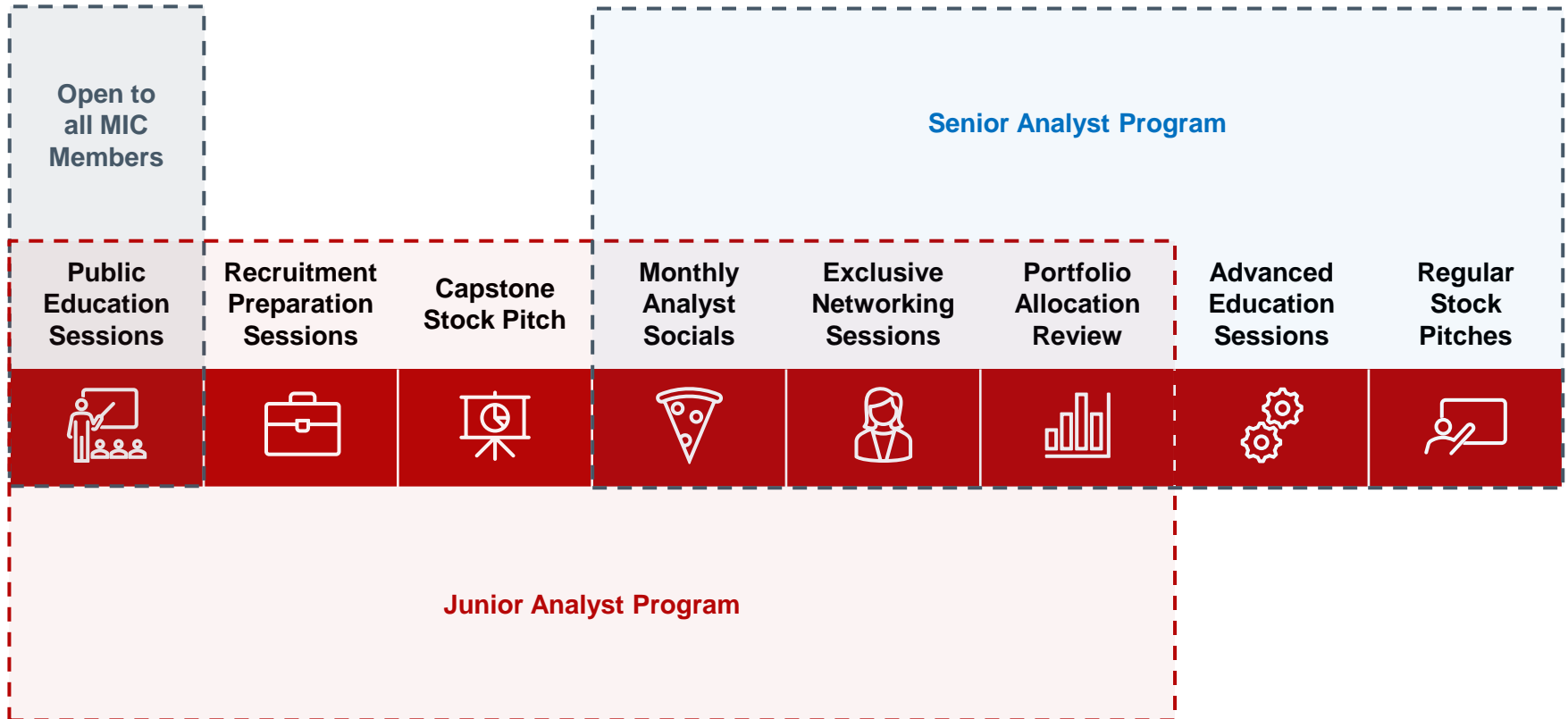


**Mohammad Ali
Hanachi**

Coordinator

Club Overview

Investment Committee Overview



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

About Us

Investment Committee Overview

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

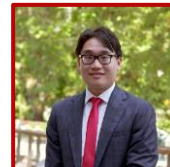
Senior Analyst Sessions

- 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

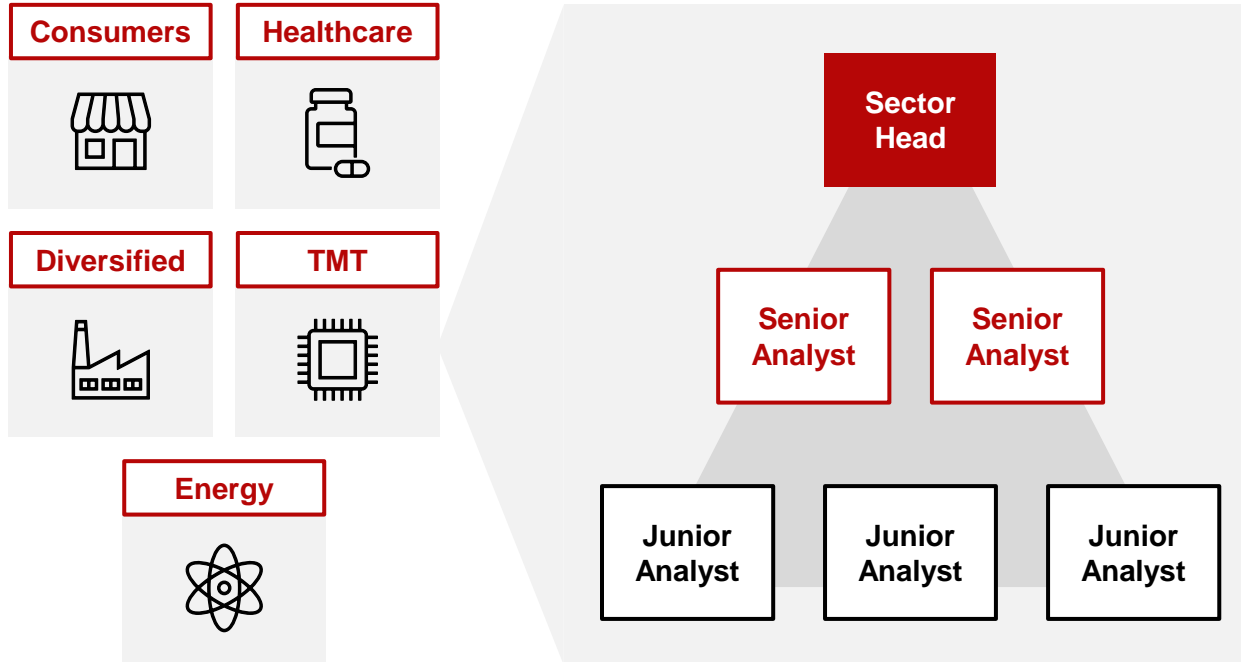
Portfolio Management

- 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

About Us

Investment Committee Structure

Junior Analyst Program Structure



- The Investment Committee's structure is made up of 5 industry sectors consisting of 1-2 Sector Heads, 2-3 Senior Analysts, and 3 Junior Analysts
- 15 first-year McGill students are selected to join the Junior Analyst program, consisting of rigorous training, mentorship, and culminating in an internal stock pitch competition
- Senior Analysts are second-year students that pitch investment ideas for the MIC's mock portfolio, and mentor their respective Junior Analysts

Previous Partnering Firms

ALTAS

Bloomberg

Desjardins

Fidelity INVESTMENTS

Moelis

ONEX

Point 72

Exclusive Networking Sessions



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

About Us

History of Success

Sector Heads

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

Historical Analyst Summer Placements

2021						
2022						
2023	ALTAS	Georgian	inovia	Moelis	Morgan Stanley	 
2024			EVERCORE			

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

About Us

Investment Committee Team

Consumer & Retail



Julian Robinson



Anna Puscas



Antoine Paradis



Jacob Frankfort



Claire Park



Richard Wang



Lara Collins

Diversified Industries



Luca D'Alessandro



Jacob Davidson



Kevin Wang



Andrew Cutler



Nora Allison



Ryan Fox

Energy



Athon Wyllyniko



Guillaume Carlesso



Giovanni Mainella



Juan Manuel Gutierrez



Claire O'Leary



Jasmine Ma



Mohammed Al Harazi

Healthcare & Life Sciences



George Cantoni



Alexandra Barcza



Liam McLaughlin



Michael Tileman



Alexander Maghnieh



Amit Garg

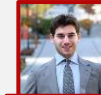


Ava Getzler

Technology, Media, & Telecom



Vansh Juneja



Jeremie Nathaniel



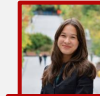
Jessika Veilleux



Evan Ketzner



Finlay Charlesworth



Lucy Kolde

About Us

Women in Finance Convention

About the Women in Finance Convention

- This year marked the 2nd edition of the MIC's **Women in Finance Convention**
- The event was spread across three days and included: firm information sessions, workshops, a senior leader panel, networking luncheons, and a fireside chat
- Provided an opportunity for delegates to connect with other ambitious female-identifying students, professionals, and leaders in Canadian capital markets
- The convention acted as mechanism to demystify what various roles at financial institutions entail, as well as to increase access to those jobs for women at McGill by teaching students the skills needed to apply and succeed
- This year, the event included 50 delegates and 8 partnering firms

WIF Convention Photos



WIF Convention 2023 Day 3, Aritzia Sponsorship



WIF Convention 2022 Day 2, BMO Session

2023 Organizing Committee



Katherine Lake, Florence Dolan, Anna Puscas, Afton Wylynko, Lucy Kolde, Katie Chao, Shiraz Meisels, Elisa Bonnet

2023 Partnering Firms

ARITZIA



CPP Investments

JARISLOWSKY FRASER
GLOBAL INVESTMENT MANAGEMENT

PSP
Investissements
Investments



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

About Us

Toronto / Montreal Finance Conventions

Convention Overviews

- The **Toronto Finance Convention** and **Montreal Finance Convention** are the MIC's annual flagship Winter 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
- The conventions 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



- This year marks our 16th annual TOFC and MOFC, having been inceptioned in 2009
- 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

Previous TOFC & MOFC Events

Firm Tours



Networking Meals



Past Partnering Firms



The Toronto and Montreal Finance Conventions are geared towards students entering summer internship recruitment cycle for investment banking, private equity, and other finance roles

About Us

Our Global Alumni Presence

Investment Banking



Asset Management



MBA Programs



The McGill Investment Club has a global alumni presence across various reputable financial and educational institutions

2. Global Stock Pitch Competition



Event Overview

GSP Competition Details

Description

- The MIC's Global Stock Pitch Competition is **one of the largest of its kind in North America**
- On March 30th, 2024, teams of 1-4 will compete for a prize pool of **C\$7,500**
- The competition is open to all undergraduate students worldwide
- Interested students must register via the **form on our website**, then **submit their pitch deck and a copy of their resumes** to investmentclub@mail.mcgill.ca
- From there, 25 teams will be selected to compete in the event's semifinals
- Semifinalist teams will be distributed across 5 breakout rooms, and the winner of each breakout room will progress to the finals, which will take place in the afternoon
- The event will conclude with a **speaker panel** with representatives from the event's sponsors
- Following the speaker panel, **the final standings and superlative winners will be announced**
- Prizes will be distributed to the winners in the following weeks

Past Participating Schools

- As its name implies, the MIC's Global Stock Pitch Competition pulls competitors from across the world
- Last year, students from **over 45 schools** worldwide participated, including:



Past Judging Firms

- The semi-final and final rounds of the competition are judged entirely by representatives from leading global financial institutions
- Last year, **20+ judges** participated in the event, with previous competition judges working at firms including:



Submission & Assessment Process

Competition Details

Pitch Requirements

- Delegates must create a stock pitch (long or short) covering a firm within any industry
- The selected stock can be listed on any exchange, but must have a market capitalization between **US\$1 billion – US\$10 billion**, and a **stock price greater than US\$5.00** (once adjusted for exchange rates), as of March 21st, 2024
- The pitch deck must contain **15 slides or less**, excluding title slides and any appendices
- Pitches must include the following sections: Company Overview, Investment Theses, Macro & Micro Factors, Financial Valuation, and Risks & Catalysts
- Each team will have **15 minutes to present** followed by a **10 minute Q&A session** with judges
- A comprehensive breakdown of pitch requirements can be found in the competition rulebook available here: mcgillinvestmentclub.ca/stock-pitch
- Note that pitches will be judged solely based on the content **contained within** the submitted pitch decks

Judging Criteria

- Initial pitch screening, as well as competition judging will be based on the following rubric:
 - 1. Company & Industry Overview (10%)**
 - Macro and Micro Overview
 - 2. Investment Theses (30%)**
 - Creative/Insightful Qualitative and Quantitative Reasoning
 - 3. Valuation (30%)**
 - DCF, Comparables, Precedents, Price Target, Sensitivity Analysis
 - 4. Risks and Catalysts (5%)**
 - Internal and External
 - 5. Overall Presentation (10%)**
 - Presentation Skills, Professionalism, Slide Quality and Formatting
 - 6. Judge Q&A (15%)**

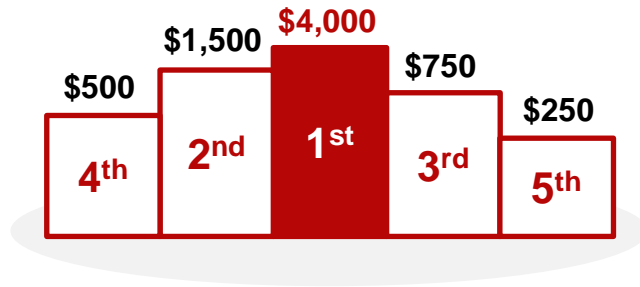
Be extremely thorough and informative, but precise – focus on the core material elements of your theses

Prize Pool & Sponsors

Competition Details

Finalist Prize Pool

- Of the **C\$7,500 prize pool**, C\$7,000 is allocated towards the top 5 finalist teams, with the following breakdown:



Superlative Awards

- Additional superlative prizes, which **all semi-finalists** are eligible to win, will be awarded following the finals
- In addition to the finalist prize pool, additional prizes will be awarded for the following categories:
 - Best First Year Team (C\$125)**
 - Best Formatting (C\$125)**
 - Best Speaker (C\$125)**
 - Best Inter-School Team (C\$125)**

Competition Sponsors

- This year, the competition has the generous support of several **leading firms from Canada and the U.S.**
- Sponsors are involved in every area of the competition, including through judging the finals, speaking in the sponsor panel, and through their financial contribution towards the prize pool
- Semi-finalists and finalists will gain unique exposure to our sponsors, both through the competition semifinals / finals and inclusion in an **exclusive resume booklet** shared with each sponsoring firm

Gold Sponsors

JARISLOWSKY FRASER
GLOBAL INVESTMENT MANAGEMENT

Sprott



Point 72

WARBURG PINCUS

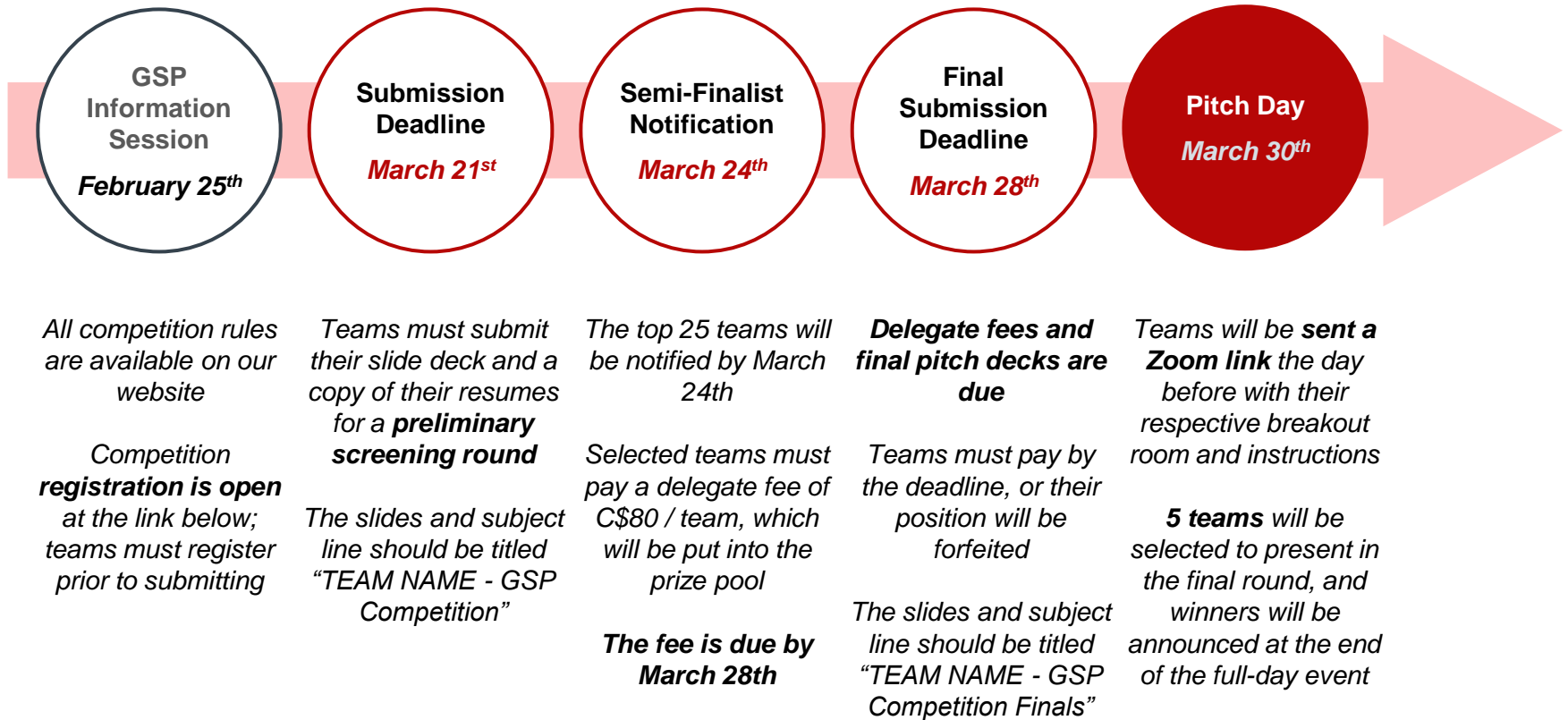
3. Key Dates



Key Dates

Timeline for the Coming Weeks

Timeline Overview



Teams can register now at mcgillinvestmentclub.ca/stock-pitch. Teams must then submit their final decks and resumes to investmentclub@mail.mcgill.ca by the deadline to be officially considered

Contact Information

Our Executive Team

Co-Presidents



Cooper Koreen | *Co-President*
cooper.koreen@mail.mcgill.ca



George Cantoni | *Co-President*
george.cantoni@mail.mcgill.ca

Executive Team



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