

02.21.2023

Memo

To
UBERG Members

Hello UBERG Members,

From
Aiden Herron (President)

The purpose of this memo is to outline the Spring 2023 semester and answer general questions about the club. Please read this document carefully. If you still have questions, feel free to contact me via email: apherron@buffalo.edu.

Re
Spring 2023 Information

First and foremost, I would like to address the winners of last semester's case competition. I have spoken with Chris Salem in regard to the prize distribution. We got a green light to go ahead and distribute the gift cards. With that being said, if you were a winner of the competition, we will be adding you to an email list shortly. Once we have confirmed all of the winners, we will be emailing the gift card codes to your email individually. This process should be completed by the end of this week.

Below you will see short sections outlining important information about this semester. Again, please read carefully.

Case Competition

This semester, we plan on holding a Portfolio Management Competition. For this competition, you will be split into teams in which you will manage a portfolio of one million dollars on a paper trading simulator. The team with the best returns at the end of the semester will be champions! Unfortunately, we will not be able to provide prizes this semester per the request of the School of Management. However, this competition will allow you to gain experience managing a portfolio, conducting equity research, and much more! More details will be provided at our first meeting.

Meetings

Our meetings will be Wednesdays at 7:00 PM in NSC 225 (Occasionally NSC 218). The typical meeting format will be as follows:

1. Ten to fifteen-minute informational presentation covering various topics such as trading strategies, current events in the markets, portfolio theory, research techniques, etc.
2. Q&A/Discussion session about the topic covered
3. Break off into portfolio management teams to work on portfolios

UB Equity Research Group

Website: <https://www.ubequityresearchgroup.com/>



Special Events

Occasionally, we will have a special event during our meeting time. Below is the list of special events. These events are subject to change.

1. Graduate Programs & Careers in Finance Information Session, **March 15th**
2. Guest Speaker: Thomas Insalaco, CFA, ASA, CEPA – MPI Advisory, **TBD**
3. Sustainable Investing Information Session with UB Sustainability Club (Guest Speaker TBD), **TBD**
4. TKIG Information Session, **TBD**

*We are working on getting more speakers at this time so stay tuned!

Dues

In light of there being no prizes for our competition this semester, we will NOT be collecting dues.

UB Linked Event Passes

In order to retain our meeting room, students must check in using the QR code that will be posted on the projector before each meeting. Competition of check in is MANDATORY.

Meeting Schedule

Wed, Feb 22, 2023 7:00 PM EST - Wed, Feb 22, 2023 8:00 PM EST at NSC 225
Wed, Mar 1, 2023 7:00 PM EST - Wed, Mar 1, 2023 8:00 PM EST at NSC 225
Wed, Mar 8, 2023 7:00 PM EST - Wed, Mar 8, 2023 8:00 PM EST at NSC 218
Wed, Mar 15, 2023 7:00 PM EST - Wed, Mar 15, 2023 8:00 PM EST at NSC 225
Wed, Mar 29, 2023 7:00 PM EST - Wed, Mar 29, 2023 8:00 PM EST at NSC 218
Wed, Apr 5, 2023 7:00 PM EST - Wed, Apr 5, 2023 8:00 PM EST at NSC 225
Wed, Apr 12, 2023 7:00 PM EST - Wed, Apr 12, 2023 8:00 PM EST at NSC 225
Wed, Apr 19, 2023 7:00 PM EST - Wed, Apr 19, 2023 8:00 PM EST at NSC 225
Wed, Apr 26, 2023 7:00 PM EST - Wed, Apr 26, 2023 8:00 PM EST at NSC 225
Wed, May 3, 2023 7:00 PM EST - Wed, May 3, 2023 8:00 PM EST at NSC 225
Wed, May 10, 2023 7:00 PM EDT - Wed, May 10, 2023 8:00 PM EDT at NSC 225

UBERG Website

The UBERG website (<https://www.ubequityresearchgroup.com/>) is an excellent resource for finding information in regard to UBERG. There, you can find our next meeting date and time, as well as the zoom link for our meeting if we have a remote meeting. Additionally, you will be able to find the informational slides from our meetings. UBERG board member's contact information will also be available on the website.

Contact Methods

Our club uses the GroupMe app to communicate information to its members. To join the GroupMe use the following link or QR Code:

Link: https://groupme.com/join_group/89571106/4T9XerEb

QR Code:

**Conclusion**

Hopefully this memo was comprehensive; however, if you have any other questions please do not hesitate to email me (apherron@buffalo.edu). More information will be provided at our first meeting. We encourage you to come out and see what we're all about!

Sincerely,

Aiden Herron
Club President
