



Johnson  
Cornell  
SC Johnson College of Business

## ***The 4th Annual Cornell Investment Portfolio Case Competition***

*Organized by Cornell's Parker Center for Investment Research,  
Johnson Investment Management Club and Cornell Financial Engineering Manhattan (CFEM)*

**Friday, January 31, 2020, Cornell Tech Campus, Roosevelt Island, NYC**

The **Cornell Investment Portfolio Case Competition** is an intercollegiate portfolio design competition, offered to create awareness of portfolio management careers and facilitate students' networking and recruiting opportunities in the field with sponsoring firms. The competition is designed to promote analysis and investment strategy development in private wealth, retirement and endowment/foundation asset management and portfolio construction and risk management.

Each school will send a team of 3-4 1<sup>st</sup>-year graduate students to present their investment case analysis and portfolio recommendations to attending judges and recruiters from sponsoring firms. Students will have one week to research the case, will make a 10-minute presentation and respond to 10 minutes of questions, and are required to provide a 2-page summary to judges.

Time will be set aside for career coffee chats and resume books of participating students will be distributed to sponsoring firms.

**Why Students Should Participate:** Compete in a unique investment challenge that is ***different than popular stock picking and pitching competitions***. Experience the intensity, depth, and breadth of questions posed by top investment professionals - the kinds of questions asked daily in the investment business. Network with investment industry professionals - IPCC judges, sponsors, and competitors who will soon enter the investments field. Practice creative analyses and prepare concise, compelling presentations.

**Who Should Participate:** 1<sup>st</sup>-year MBA and finance master's students interested in ***pursuing careers in investment management*** and are preferably still looking for internship or permanent employment opportunities. This competition is ideal for students interested in portfolio construction and management.

**Recommended Selection Process:** We encourage schools to distribute information about this event broadly on campus, particularly to the investment clubs, and hold internal competitions to determine their teams. Two teams from one university may apply, and may be selected to attend as long as members of the teams attend different programs and there is sufficient space.

***2020 Case: Case Topic: Target-Date Funds 3.0***

**First Prize \$5000, Second Prize \$1000**

### **DATES**

December 3: [Informational Video](#), available at 4:00 PM EST

December 9: Application Deadline

January 17: \$100 Registration fee due for accepted schools

January 22: Case Distributed Electronically

January 31: Case Competition

- Interviews by invitation of sponsors, 9:00 AM – 11:00 AM
- Coffee chat signups 10:00 AM
- Lite Breakfast beginning at 10:15 AM, presentations beginning at 11:15 AM award reception at 5:00 PM

**FOR MORE INFORMATION** including information about last year's competition, go to:  
[www.johnson.cornell.edu/Parker-Center-for-Investment-Research/Investment-Portfolio-Case-Competition](http://www.johnson.cornell.edu/Parker-Center-for-Investment-Research/Investment-Portfolio-Case-Competition)

**Team Application Form:** In one page or less, please describe your team's background and why you would like to participate in this year's IPCC. Please indicate how your team was selected. Include your response with this form and all resumes. Applications can be e-mailed or faxed by **Monday, December 9, 2019** to the Parker Center, Cathy Wetterer at [cjw7@cornell.edu](mailto:cjw7@cornell.edu). Fax is 607-255-0506.

Date of application: \_\_\_\_\_

School: \_\_\_\_\_

Resumes attached: \_\_\_ Yes \_\_\_ No

Team Members:	Graduation Month/Year	Email	Phone Number of team leader
1) _____	_____	_____	_____
2) _____	_____	_____	
3) _____	_____	_____	
4) _____	_____	_____	

Backup Team Members:

- |          |       |       |
|----------|-------|-------|
| 1) _____ | _____ | _____ |
| 2) _____ | _____ | _____ |