

**Finance Department Guideline**  
**For FIN65A/B & FIN75A/B Student Selection**  
**2024-2025**

This guideline is intended to advise students on the selection process for FIN65A/B and FIN75A/B. Students selected and enrolled in these two courses will collectively manage the TRSM Student Managed Investment Fund (SMIF). The SMIF is an investment fund kickstarted in September 2000 with seed money of \$500,000. Its mission is to complement student in-class knowledge with real-life learning in equity research, analysis, selection, and management through hands-on experience with a real-money portfolio.

FIN65A/B and FIN75A/B are open electives for students in the School of Business Management, Accounting and Finance, and other programs, subject to the Finance Department's consent. The two courses run simultaneously in the same room. The Fall2024/Winter2025 offering spans two terms, starting in the Fall and ending in the Winter. The class meets 1.5 hours/week over 24 weeks. The courses are offered in the evening to make it easier for those students on Co-Op.

Students in FIN65A/B will take on the role of an Analyst. They will assist Portfolio Managers (students in FIN75A/B) in producing Initial Sector Coverage Reports, updating portfolio holdings and providing research reports throughout the term. Students in FIN75A/B will take on the role of a Portfolio Manager. They will mentor Analysts (students in FIN65A/B) in producing the Initial Sector Coverage Report, recommending and defending investment decisions, creating a comprehensive Term Report and making the final Sector Term Presentation. Students in FIN75A/B will also assist the Faculty Advisor in meeting all monitoring, compliance and reporting requirements, attending and representing the Fund at Advisory Board meetings.

The department selection criteria for FIN65A/B include:

- Completion of FIN401 or AFF310 is strongly preferred;
- Effective writing and oral communication skills;
- Effective teamwork skills;
- Previous experience in investment and portfolio management, if any (e.g. relevant co-op or internship experience, participation in student associations such as Ted Rogers Investment Council), is preferred

The department selection criteria for FIN75A/B include:

- Have completed FIN65A/B or have an advanced standing in investment knowledge and skills (e.g. Portfolio Manager at Ted Rogers Investment Council);
- Effective writing and oral communication skills;
- Effective leadership skills.

The department selection process will follow all applicable university guidelines to promote equity, diversity and inclusion. The application package must include the following:

- A cover letter,
- A copy of the TMU transcript, and
- An up-to-date resume.

Applicants may be required to provide additional material or to attend an interview.

The timeline of the selection process for the Fall2024/Winter2025 is as follows:

<b>No.</b>	<b>Steps</b>	<b>Fall 2024/Winter 2025</b>
1	The department sending out an email calling for applications	June 2024
2	Students submitting application material via Google Form	June - July 2024
3	Department selection period	July 2024
4	Results announced, and students enrolled in RAMSS	July -August 2024

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