

# DeGroot Finance & Investment Council

2021-2022

# DeGroote Finance & Investment Council

## Club Overview

*DFIC is a student-led club focusing on providing students of finance with perspectives of the financial services industry while building strong ties with firms that will actively seek out McMaster students for their recruitment needs*



1998

The DeGroote Finance Association "DFA" was founded, the club was focused on events and creating networking opportunities



2012

The McMaster Investment Council "MaIC" was founded, the club was focused on educating students and investing through a mock portfolio



2020

MaIC and DFA merged to create a clear vision statement. We are here to teach and collaborate with McMaster students to lead them to securing highly coveted careers



### Investment Council

Provides analysts with a formalized education program catered towards students interested in securities analysis. Focuses on developing hard and soft skills such as financial modeling, presentation and critical analysis of publicly traded entities.



### Events

Provides learning and networking opportunities to all students interested in finance. Ranging from large 100+ person networking events to in-depth tutorials on complex financial topics not covered in the classroom.



### Private Markets

Provides analysts with a formalized education program catered towards students interested in private equity and venture capital. Giving them the opportunity to work alongside real-world firms and create work product for mid market private equity shops.



# DeGroote Finance & Investment Council

## Mission Statement

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*"To be a resource to all students who wish to seek a career in Finance at a Fortune 500, in Capital Markets, Consulting, or Corporate Law. Our mission is to provide members with the adequate resources to succeed in the competitive Finance Industry through our five pillars."*

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I



### Career Sessions

- Dedicated to teaching students about different careers and introducing them to all options in Year 1
  - Benefits students by ensuring they are prepared and on the right track to pursue the career of their dreams
  - Examples include: Introduction to Sell Side, Buy Side, Consulting, Suits: Bankers & Lawyers, etc.
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II



### Learning Sessions

- Created to teach students about current events and provide hands on learning experiences with practice files
  - Created to ensure students are prepared for interview, internships, and full-time jobs
  - Examples include: Financial Statement Overview, Modeling, Market Recap, Newsletter
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III



### Big Events

- Networking events to allow students to create meaningful connections that they can lever in their careers
  - Competitions that allow students to test their skills against students from across Canada
  - Examples include: the Bay Street Mixer, Annual Stock Pitch Competition, Golf with Bay Street Professionals, etc.
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IV



### Investment Fund

- Balanced Investment Fund focused on 5 sectors: TMT, Resources, Financial Institutions, Diversified, and PUI
  - Provides students with hands on research, valuation, and presentation experiences
  - Former members have graduated and secured careers in Investment Banking, Equity Research, Buy-Side, etc.
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V



### Private Markets

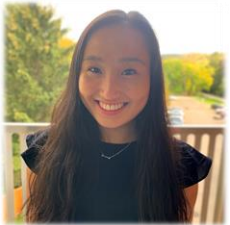
- Dedicated to practical experiential learning for students' interest in careers in private equity and venture capital
  - Partnership opportunities with real-world investment firms to provide research and due diligence support
  - Provides students with hands on experience in complex private market transactions
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### Leadership



#### Kayden Hudda, VP Internal

- Level 3 Honors Commerce, Mathematics and Computer Science dual degree
- Previous experience at Equitable Bank



#### Wynette Wong, VP External

- Level 3 Honors Commerce
- Previous experience at Riipen and Scotiabank Sales & Trading
- YouTube @ itswynette

### What We Offer

#### *Bay Street Mixer*

Held in downtown Toronto, the BSM provides members and professionals with a social experience to network naturally one on one.

#### *Speaker Sessions*

Ranging from junior analysts to senior executives, DFIC hosts a wide variety of professionals who come to share their insights and experiences with members.

#### *Stock Pitch Competition*

Held in March, the competition is open to all McMaster Students as well as other universities and is attended by alumni and industry partners.

#### *"Intro To:" Series*

This speaker series introduces members to various different career paths in finance. Hosted by DFIC members who have worked in the respective field.

#### *Road To CFO*

In partnership with the DeGroot Accounting Association, DFIC hosts finance executives to share lessons learned throughout their career.

#### *Weekly Newsletter*

The club publishes a weekly newsletter highlighting trends in the markets, news stories, and upcoming club events. A dedicated team of students publishes the weekly newsletter.

### Getting Involved

*The Events team facilitates DFIC's day-to-day operations and organizes the many events we offer to students*

*We hire for Director positions during the closing school year and Associate roles September of the current school year*

#### Associate

1<sup>st</sup> / 2<sup>nd</sup> Year

~15 Positions

*No prior experience required, just interest and work ethic*

#### Director

3<sup>rd</sup> / 4<sup>th</sup> Year

6 Positions

*Some experienced preferred based on position*

#### VP

3<sup>rd</sup> / 4<sup>th</sup> Year

2 Positions

*Both Internship and strong club familiarity preferred*

### Newsletter

The club publishes a weekly newsletter highlighting trends in the markets, news stories, and upcoming DFIC events.

A dedicated team of students publishes the weekly newsletter that is sent to all DFIC members.



### Mentorship

*The Mentorship team will be hosting bi-weekly classroom style educational sessions. Students can expect to learn specific details regarding niche industries, as well as strengthen their skills through hands-on assistance with resumes, networking, financial modelling, case competitions and more.*

#### First Semester

- Careers Overview
- Networking & Reaching out to a Mentor
- Building a Resume/Cover Letter
- Interviews/Technical Questions
- Accounting Basics
- Equity/Enterprise Value Guide & 3-Statement Modeling

#### Second Semester

- Valuation Lesson: DCF, Comps, Precedents
- Building a Stock Pitch
- How to complete a Case
- Case Study (Part 1)
- Case Study (Part 2)



#### Steven Klos

- Level 4 Commerce
- Business Development Bank of Canada & INVRS

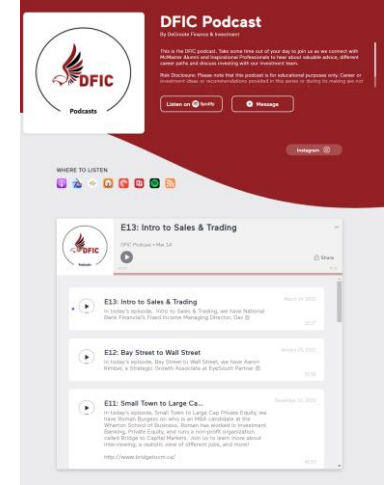


#### Michael Carnevale

- Level 4 Commerce
- Wells Fargo & BMO

### Podcast

The podcast allows students to hear from McMaster Alumni and inspirational professionals about a wide variety of topics including different career paths and investing. Released episodes feature professionals from...



### Leadership



#### Ryan Witcher, VP Internal

- Level 5 Honors Commerce
- Previous experience at BofA Securities in Equity Research and TD Wealth



#### Zarik Virani, VP External

- Level 5 Honors iBioMed Student
- Previous experience at RBC Capital Markets in IB and LaurelCrest Partners

### What We Offer

#### Diverse Sector Experience

-  Diversified
-  Financial Institutions
-  Technology, Media, Telecom & Healthcare
-  Resources
-  Power, Utilities and Industrials

#### Technical Skill-Building

Hands-on and guided skill development in conducting research, financial analysis, valuation & modeling, and presentation building

-  Company & Industry Analysis
-  Investment Theses & Risks/Catalysts
-  Valuation

#### Real World Experience

Practical experience with universal business platforms in Excel and PowerPoint, with valuable exposure to Bloomberg and Refinitiv.



#### Our Alumni



### Getting Involved

*The Investment Council manages DFIC's Balanced Fund generously donated by Fidelity Canada with sector teams responsible for stock pitches throughout the year*

*We hire Portfolio Managers during the closing school year and Analyst roles in September of the current school year*

Analyst	Portfolio Manager	VP
1 <sup>st</sup> / 2 <sup>nd</sup> Year	3 <sup>rd</sup> / 4 <sup>th</sup> Year	4 <sup>th</sup> Year
~25 Positions	5 Positions	2 Positions
<i>No prior experience required, just interest and work ethic</i>	<i>Internship or strong prior Investment Council experience</i>	<i>Both strong internship and DFIC experience required</i>

### Leadership



#### Jeffrey Howson, VP Internal

- Level 3 Honors Commerce
- Previous experience at Coldwater Corporate Finance in M&A and at RBC



#### Siemens Ogbeide, VP External

- Level 5 Honors Commerce
- Previous experience at BofA Securities in S&T and Kayne Anderson in Private Equity

### What We Offer

#### Corporate Partnership

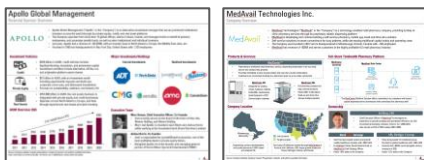
Partnering with FirePower Capital, a Toronto-based advisor and investor in mid-market companies, students are given the opportunity to work on real world problems.

Forms of assignments include industry analyses and search initiatives.



#### Technical Skill-Building

Identical learning opportunities as the Investment Council across research, analysis, valuations, and presentations, with focus angled towards private-market type investment opportunities.



### Getting Involved

*Private Markets provides exposure to alternative investment fields outside of what the Investment Council offers*

*We hire for Manager positions during the closing school year and Analyst roles September of the current school year*

Analyst	Manager	VP
1 <sup>st</sup> / 2 <sup>nd</sup> Year	3 <sup>rd</sup> / 4 <sup>th</sup> Year	4 <sup>th</sup> Year
~10 Positions	2 Positions	2 Positions
<i>No prior experience required, just interest and work ethic</i>	<i>Internship or strong prior Private Markets experience</i>	<i>Both strong internship and DFIC experience required</i>

#### Real World Experience

Practical experience with universal business platforms in Excel and PowerPoint, with other platforms leveraged for market research.



#### Career Paths

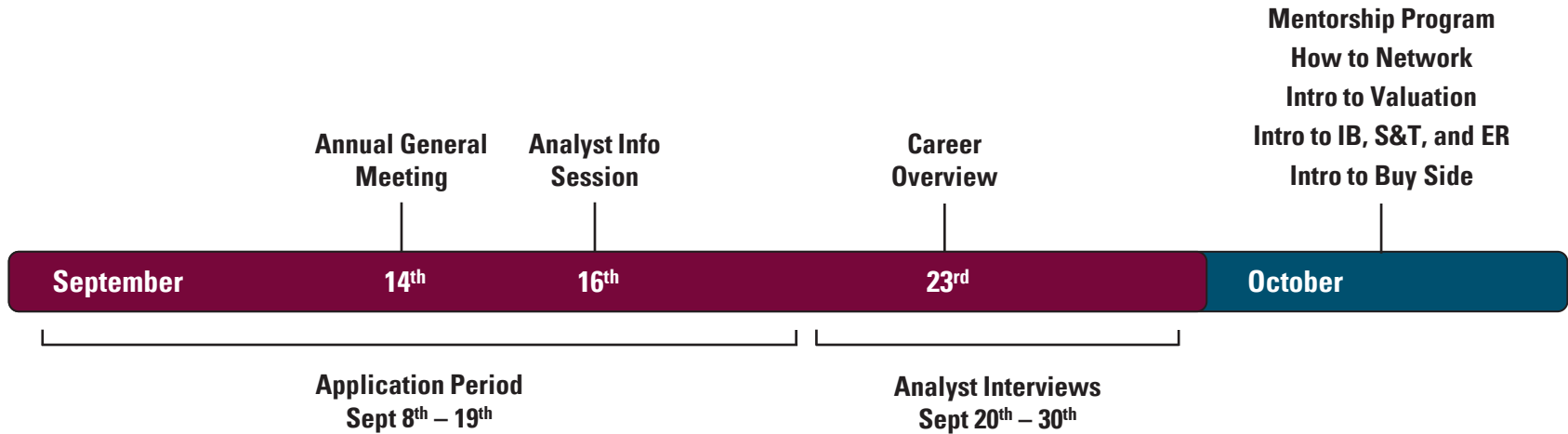
##### Private Equity



##### Venture Capital



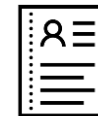
### Timeline



### Analyst Recruitment

Team	Target	Qualifications?
Investment Council	1 <sup>st</sup> / 2 <sup>nd</sup> Year	<i>No prior experience required.</i>
Private Markets	1 <sup>st</sup> / 2 <sup>nd</sup> Year	<i>Strong interest and work ethic!</i>

#### Want to Stand Out?



Create a 1-page "finance" resume



Reach out to a DFIC member!



Prepare for interview  
→ DFIC Prep Guide



# DeGroot Finance & Investment Council

Connect With Us



Apple  
Podcasts

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## Kayden Hudda, VP Events

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## Jeff Howson, VP Private Markets

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# MEMBERSHIP SALES

**\$15 TICKETS**

ATTEND SPECIAL DFIC EVENTS  
RECEIVE LATEST NEWS  
ACCESS EXCLUSIVE RESOURCES

Memberships available on these platforms



@degrootefinance

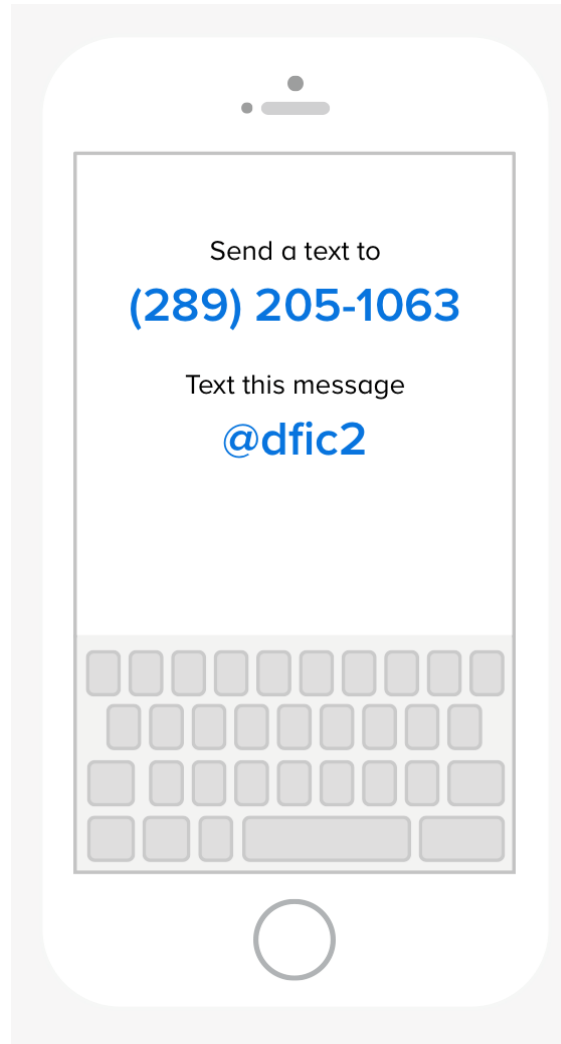


Degroote Finance & Investment Council



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**APPLICABLE NOW**



We like texting too!

Get text reminders about our deadlines, events, job opportunities, and exciting news this school year!