

MSMF

2024 Semester 2

MSMF

**Credit Program
Handbook**



WELCOME TO THE TEAM



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MSMF OVERVIEW

Monash Student Managed Fund (MSMF) is a student-led organisation within Monash University, we aim to provide practical learning opportunities that bridge the gap between the classroom and industry, creating a supportive platform for both technical and personal development.

MSMF began its journey at the start of 2022, our mission is to allow students who have a passion for finance, regardless of background, to have a defining experience that develops their employability in the fields of equities and funds management.

Despite being a young organisation, the MSMF's Investment Analysis Program (IAP) has garnered recognition for its exceptional experience, prompted the attention of Monash Faculty, and is now accredited under the unit code BEX3350.

Beyond building strong organisational partnerships, MSMF also highly values its internal operational development in participant growth, balanced diversity, event quality, industry engagement, alumni retention rate, and reputation.

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Credit Program Overview

The Investment Analyst Program (IAP) spans a 12-week semester, during which students will be strategically assigned to various investment sectors, where they will be conducting comprehensive data research and investment analysis within a collaborative environment.

The Credit Program is aligned with IAP's procedures and timeline. Under the unit code BEX3350 - Consulting Project, assessments will be based on student's IAP experiences. Students are expected to receive 6 credit points for attending this program and be marked fully based on semester assessments.

To utilise quality program experiences, the credit program will be enforced and supervised by the Monash Faculty of Business and Economics, Monash AQoL, Industry Supervisors, and the MSMF Executives.

Weekly activities are prepared by MSMF Executives, industry experts, and qualified alumni to provide quality learning sessions, facilitate team discussions and prepare for the presentation and report. MSMF will also provide networking social events and work experience opportunities through its industry partnerships and internal recruitment throughout the Credit Program.



Pre-requisites

Under the guidelines provided by Monash University, the MSMF credit program is open to students who have met all of the following requirements:

- Must have completed 96 credit points of study
- Must have 6 credit points available for the capstone unit
- Must not be pursuing a finance major



Learning Outcomes

According to the BEX3550 Unit Handbook, the learning outcomes are:

1. To identify, scope, and deliver on a particular business issue or problem
2. Demonstrate an ability to apply a broad range of knowledge and understanding of key business theories, concepts, tools, and techniques in a particular context
3. Reflect and report on the personal and professional development derived from the project, either individual or team-based.

Assessment	Worth	Due Date	Learning Outcome
1. Self Reflection	30%	Week 6	Reflect and report on the personal learning derived from the project experience
2. Pitch Night [Project Presentation]	20%	Week 11	Investigate, describe, consider, and evaluate a specific business issue; Report on the outcome of the project
3. Equity + Valuation Report [Project Report]	50%	Week 12	Demonstrate an ability to apply a broad range of knowledge and understanding of key business theories, concepts, tools, and techniques in a practical context; investigate, describe, consider, and evaluate a specific business issue; Develop higher level business conceptualisation and understandings about the topic under investigation; Report on the outcomes of the project



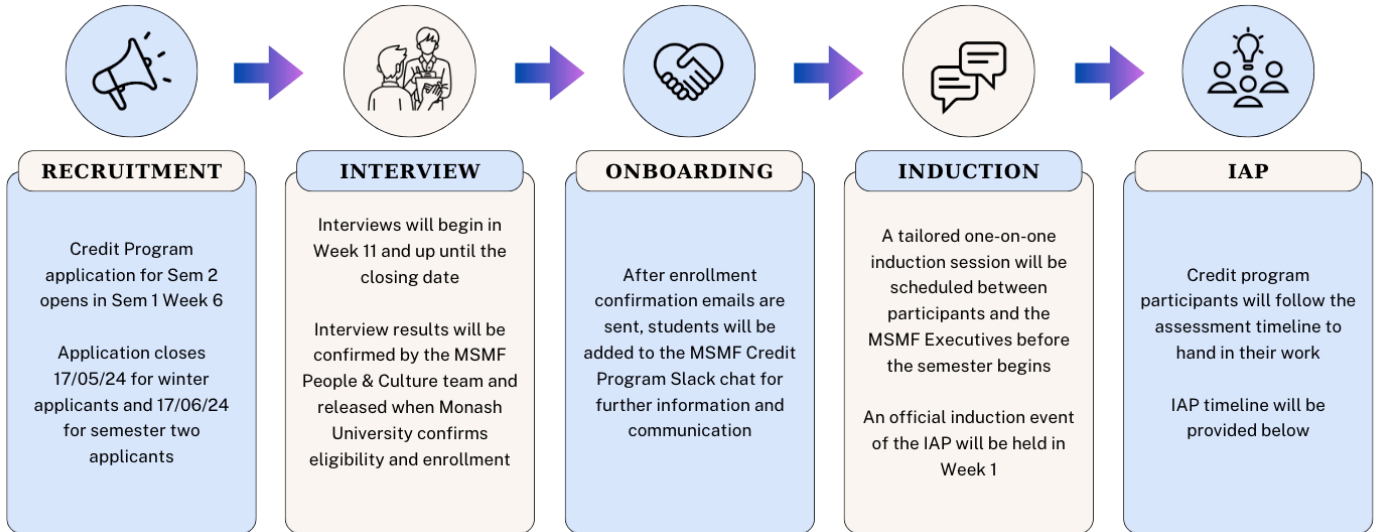
Expectation & Obligation

Besides academic achievements, MSMF typically expects participants to demonstrate professionalism, eagerness to learn, and adaptability. Students should actively engage in assigned tasks, seek guidance when necessary, and demonstrate initiative in solving problems. Also, punctuality, effective communication, and reliability are crucial, as students rely upon each other's contributions to meet deadlines and achieve high performance.

Simultaneously, mutual respect and support are essential when shaping a healthy competitive environment. Furthermore, students are encouraged to show enthusiasm for social networking opportunities to enhance their professional connections. The most important obligation for all credit program participants is to ensure everyone has a pleasant and fruitful experience by the end of the program.



Process & Timeline



Week	Activities	Purpose	Presenter(s)
1	Launch Night	Official induction to the IAP and credit program	MSMF Executives
2	Fireside Chat	Introduction to the world of finance via expert conversations	2 industry professionals
3	Fundamentals Workshop	Introduction to the fundamentals for investment teams	Yu Li from Blackmore Capital
4	SIG Presentation	Provide insight into the world of quantitative trading and research analysis	SIG partners
5	Social Night	Member welfare event to facilitate an inclusive networking opportunity	N/A
6	University club collaboration	Collaborations with Monash University's student organisations for large-scale events	To be confirmed
7	Valuations Workshop	In-depth tutorial on DCF and valuation methods for investment teams	Associate Professor Mukesh Garg
8	Accounting/Talaria Workshop	Accounting-focused tutorial for investment analysis	Jon Razos from Talaria Capital
9	Mock Presentation Night	To practice and improve team presentation via constructive feedback	Investment Analysts
10	Final Collaborative Session	Collaborative session for teams to wrap up their semester's work	MSMF Executives
11	Presentation Night	The culmination of the investment team's efforts over the semester	Investment Analysts
12	Feedback	Help IAP to improve for future participants	N/A



Q: Does attendance matter for the workshops?

A: Yes. Although your attendance is not marked, it will be recorded and reported to the Chief Examiner and academic supervisors as a reference for the marking report.

Q: Why aren't the academic supervisors marking the assessments?

A: The marking structure ensures MSMF (being a student-led organisation) has the liberty to be run independently. The marking process will be supervised, peer-reviewed, and justified in the marking reports.

Q: Can I choose which team to join?

A: No. The teams are designed to have equal capabilities and a balanced diversity. Thus, applicants will be strategically allocated based on their strengths, skill sets, and past experiences.

Q. How many hours per week will the program require?

A. Ideally, you will be looking at 4-6 hours per week for the IAP excluding your normal assessments. According to the BEX3350 unit guideline, the minimum workload is 144 hours per semester inclusive of the IAP activities.

Q. Is there a support system for program participants?

A. Yes. Participants can directly contact the MSMF project manager for any questions through Slack and email. Feedback forms are also available if participants want to comment anonymously.

Q. Is there any dress code during the program?

A. Casual clothes are fine, however, we highly recommend wearing business casual clothes when attending IAP events that include industry professionals and mentors. Photographers will also be attending the major events, so it will be a good time to look professional on MSMF social media posts.

Q. What happens after the IAP?

A. Historically, most IA stay on with MSMF, moving into different roles. Typically leadership roles such as investment team leader or investment director. Alternatively, there is the option to apply for operations or portfolio positions.