Finance 101

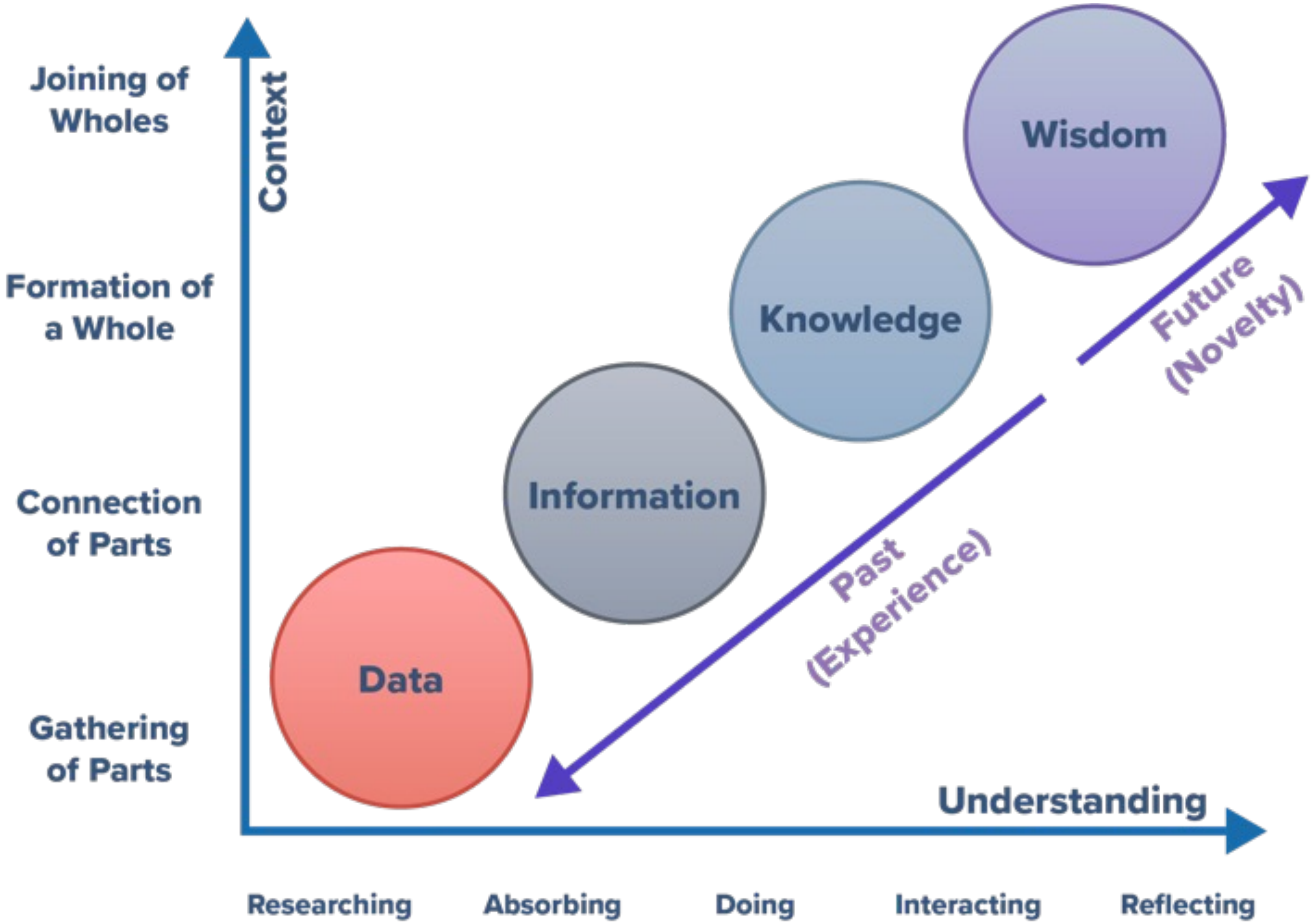
Knowledge ► Power!

— Sir Francis Bacon, 1597

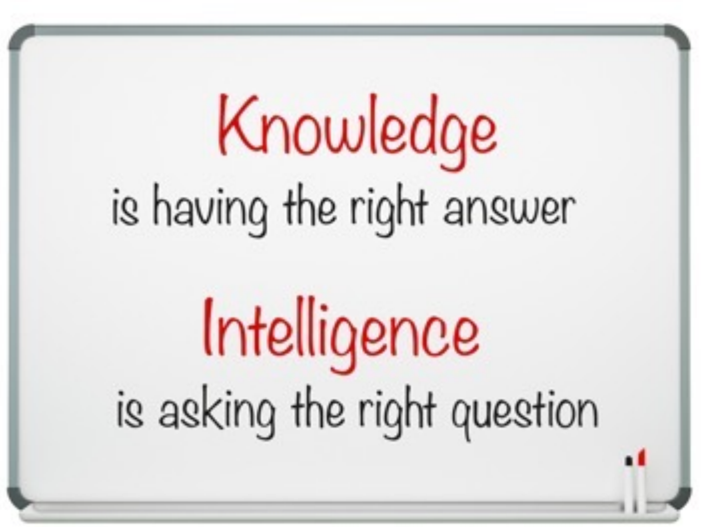
Knowledge about Money ► More Money!!

— Kurtay Ogunc, 1997

"Intelligence Path"



Source: Omid, M. (2014) How to characterize DIKW (Data, Information, Knowledge, Wisdom) hierarchy?



Meet the Department Chair

Dr. Yingmei Cheng

Lloyd F. Collette Endowed Chair of Financial Services
Professor
Department of Finance

Meet Your Undergraduate Advisor

Kurtay Ogunc, PhD, MBA, MApStat

- Director of Undergraduate Studies & Research
- Director of Asset Management Academy
- Senior Instructor
- Ogden Honors College Advisor
- Advisor to the Math/Finance degree program

kurtay@lsu.edu

www.LinkedIn.com/in/kurtay

Office of Business Student Success

OBSS brings together undergraduate academic services, professional development, international experience, and other critical services like student engagement and Business Residential College programming. Through OBSS, all of these services are centrally housed on the second floor of the BEC Rotunda at 2000 BEC.

- **Dr. Ashley Junek**, Assistant Dean for Academic Programs
- **Melanie Buchmann**, Academic Services Director
- **Stephanie Gandy**, Assistant Director, Professional Development

What is Finance

- **Finance** is the study of how individuals, businesses, and organizations acquire and utilize **money** to create sustainable **value** for the shareholders by taking on intelligent **risks** and making smart **decisions**.
- We offer a high-quality and rigorous curriculum for undergraduate students, who are interested in pursuing careers with growth opportunities in the following fields:
  - **Corporate Finance**
  - **Asset Management**
  - **Wealth Management**
  - **Venture Capital**
  - **Commercial Banking**
  - **Investment Banking**
  - **Private Equity**
  - **Equity Research**
  - **Consulting**
  - **Real Estate Finance**

Why a Career in Finance?

1 SALARY

Starting:
$70K
Mid-Career:
$120K+

2 IT FITS YOU

Leader,
Problem Solver,
Self-Driven,
Analytical,
etc.

3 IN DEMAND

Positions are expected to grow 7–14% within the next 10 years.

4 VARIETY

The industry opportunities are almost endless.

5 NEVER BORING

Fast-paced,
Traveling,
Team Player,
Leading,
etc.

BS in Finance Curriculum

(effective 2019 – 2020 Academic Year)

CORE COURSES

- **FIN 3716** – Principles of Finance (required for all business students)
- **FIN 3717** – Fundamentals of Corporate Finance
- **FIN 3826** – Fundamentals of Asset Management
- **FIN 4820** – Financial Modeling & Analytics
- **FIN 4830** – Financial Statement Analysis

Track Electives

Asset Management (Kurtay Ogunc | kurtay@lsu.edu)

- **FIN 4828** — Security Analysis and Portfolio Management
- **FIN 4850** — Financial Derivatives
- **FIN 3845** — Student Managed Fund (Tiger Fund)
- **FIN 4910** — Introduction to Alternative Assets
- **FIN 4840** — Asset Allocation
- **FIN 3636** — Financial Markets and Institutions

Corporate Finance & Investment Banking (Mike Kirby | mkirby@lsu.edu)

- **FIN 3720** — Valuation, Mergers & Acquisitions (M&A) and Buyouts
- **FIN 3718** — Multinational Managerial Finance
- **FIN 4740** — Venture Capital and Private Equity
- **FIN 4910** — Corporate Restructurings & Bankruptcy
- **FIN 3636** — Financial Markets and Institutions
- **FIN 4910** — Fintech

Track Electives

Commercial Real Estate (Brian Andrews | andrews@lsu.edu)

- **FIN 3351** — Principles of Real Estate
- **FIN 3352** — Real Estate Investments
- **FIN 3353** — Real Estate Finance
- **FIN 4354** — Real Estate Development
- **FIN 4350** — Real Estate Analytics

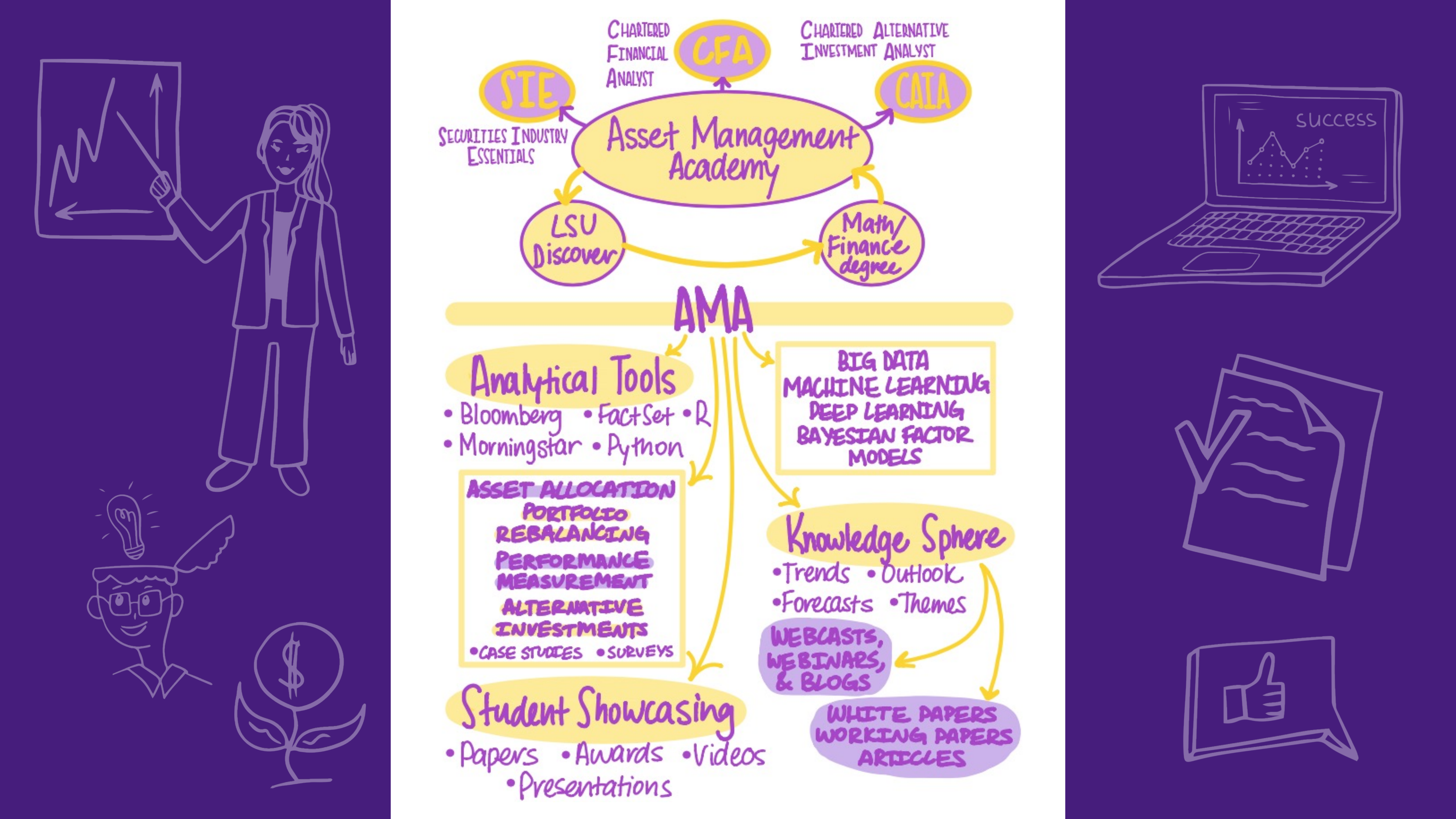
Commercial Banking (Brian Andrews | andrews@lsu.edu)

- **FIN 3632** — Introduction to Commercial Banking
- **FIN 3610** — Credit Essentials
- **FIN 3460** — Risk Management
- **FIN 3636** — Financial Markets and Institutions

Asset Management Academy

In addition to a strong academic standing; i.e., high overall and major GPA, students should demonstrate willingness and ability to go beyond classroom experience such as:

- Obtaining BMC certificate from Bloomberg
- Passing the SIE exam administered by FINRA (prereq to other FINRA exams)
- Learning a programming language such as Python or R
- Participating in national and regional competitions such as Bloomberg Trading Challenge, ETF Global Portfolio Challenge, CFA Research Challenge and Southeastern Hedge Fund Competition, and demonstrating skill in the process
- Engaging in scholarly undergraduate research - LSU Discover and SMART Lab
- Open to high-achieving students majoring in finance, economics, mathematics, computer science, engineering, and business analytics



Chartered Financial Analyst
CFA
Chartered Alternative Investment Analyst
SIE
CAIA
Securities Industry Essentials
Asset Management Academy
LSU Discover
Math/ Finance degree
AMA
Analytical Tools
• Bloomberg • FactSet • R
• Morningstar • Python
Big Data
Machine Learning
Deep Learning
Bayesian Factor Models
Asset Allocation
Portfolio Rebalancing
Performance Measurement
Alternative Investments
• Case Studies • Surveys
Knowledge Sphere
• Trends • Outlook
• Forecasts • Themes
Webcasts, Webinars, & Blogs
White Papers
Working Papers
Articles
Student Showcasing
• Papers • Awards • Videos
• Presentations
success
$

NEW YORK TRIP

Internship Track Record

A few of the companies where our students have interned:

AEGIS Insurance	Goldman Sachs	Millennium Partners
Bernhard Capital Partners	Investec Asset Management	PIMCO
BlackRock	JPMorgan	PwC
CapitalOne	KPMG	Shell
Deloitte	LASERS	TIAA
DWS	LWCC	UBS
EY	Merrill Lynch	Varadero Capital
ExxonMobil		Willis Towers Watson

Internship Course

- **FIN 3930** (3 credit hours)
- Must be **finance related** & **paid**
- Course Requirements
  - Initial Paperwork
  - 20-page report due finals week
  - Work 20/30 hours per week
  - Weekly Updates
  - Performance Evaluation Report by the supervisor

Handshake at LSU

Handshake personalizes career recommendations based on your interests and network, helping you discover new opportunities, companies, on-campus events— and build a meaningful career. Handshake is a modern, online career resource for students and alumni to:

- ✓ Explore thousands of available jobs and internships, organized in collections based on your preferences
- ✓ Quickly build out a rich profile that helps you stand out when employers search for students and alumni
- ✓ Track event and application deadlines to put your best self forward
- ✓ Schedule on-campus interviews
- ✓ Connect with employers and meet your potential at recruiting events
- ✓ Boost your career-readiness with career-planning workshops and resources

All of this and more also available on the geaux with the **Handshake Jobs & Careers** app or **lsu.joinhandshake.com**

Chartered Financial Analyst®

Certified Financial Planner (CFP) Certification is a nationally and internationally recognized professional certification offered through the CFP® Board. Certified Financial Planner Board of Standards Inc. awards the CFP® and CERTIFIED FINANCIAL PLANNER™ certification to individuals who fulfill the following initial and ongoing certification:

- Satisfy educational requirements
- Complete a minimum of three years of work experience in a financial planning field
- Pass the CFP Certification Examination
- Compliance with CFP Board's Code of Ethics and Professional Responsibility
- Continuing education and recertification

Financial planners interested in achieving a CFP certification to earn more credibility in their chosen field and provide a higher level of service to their clients are ideal candidates for this program. Other qualified participants include professionals who want a deeper understanding of financial planning and individuals interested in pursuing a career in financial planning.

For questions regarding this program or to speak to an enrollment advisor, please call 844-721-7503.

University Affiliation Program CFA Institute®

Chartered Financial Analyst®

- In 2009, the E. J. Ourso College of Business was named a CFA Program Partner by the CFA Institute, a global Association for investment professionals that awards the prestigious **Chartered Financial Analyst designation**.
- If interested, please contact Dr. Gary Sanger, the Director of the CFA Program at sanger@lsu.edu.

University Affiliation Program CFA Institute®

girls who inve$t®

SUMMER INTENSIVE PROGRAM

www.girlswhoinvest.org

- **Four-week educational experience** at either the University of Pennsylvania, learning core finance and investment concepts from top professors and building relationships with industry leaders, all with **free tuition, room, and board on-campus.**
- **Six-week paid internship** — secured by Girls Who Invest — at a leading asset management firm around the world.
- Access to a supportive professional community and the GWI private job board upon completion of the program.
- Additional resources to help you succeed, such as a Bloomberg Terminal training, interview preparation, and **one-on-one career coaching.**

SMART Lab & Bloomberg Terminals

- Provides a simulated trading floor that students use to advise the LSU Foundation on how to invest funds in LSU's Tiger Fund portfolio.
- Gain knowledge in the fast-paced world of portfolio management through practical experience in securities analysis, research, and trading.
- Features variety of financial software available for students:
  - Bloomberg Terminals
  - FactSet
  - ARGUS
  - Morningstar Direct

Bloomberg Market Concepts

- Bloomberg Market Concepts (BMC) is a **10-hour self-paced e-learning course** that provides a visual introduction to the financial markets.
- BMC consists of **6 modules** – Economics, Currencies, Fixed Income, Equities, Commodities, Options – woven together from Bloomberg data, news, analytics and television.
- By taking BMC, learners **familiarize themselves with the industry standard service** through four heavily interconnected modules.

Bloomberg Market Concepts

Goal 1: Learn the language of finance

- Supplement your university education with practical knowledge of the markets
- Familiarize yourself with over 70 Bloomberg Terminal functions

Goal 2: Discover the inner workings of the markets

- Learn what moves markets
- Familiarize yourself with key benchmarks that professionals monitor

Goal 3: Get Bloomberg on your résumé – BADGE!!

- Receive a certificate of completion after completing BMC
- Demonstrate your comfort with the gold standard data platform

CHALLENGE THE CLASSROOM

A Guide to Creating an Investment Challenge on Bloomberg

Bloomberg Trading Challenge

Competition Goals

Develop Research & Analysis Skills

Students will be asked to research companies using fundamental data and use technical analysis to conclude investment ideas. All these tools and data are available through Bloomberg.

Improve Communication & Teamwork

It is preferred, though not compulsory, to form small groups. Each team is make up of two or three students who work together to make collective investment decisions.

Build Bloomberg Skills

Throughout the competition, students use Bloomberg and utilize all possible functions to help their research.

Stay Abreast of the Market

To improve their chances of making profitable decisions, students must follow overall market trends, being mindful of M&A or earning releases of their target companies. It is a perfect exercise to keep them engaged with current financial markets.

Develop Investment Strategies

Students are required to devise a strategy and evaluate its effectiveness throughout the competition

SOUTHEASTERN HEDGE FUND COMPETITION

Win a scholarship and connect with hedge fund professionals.

In the Southeastern Hedge Fund Competition student teams submit hedge fund strategy proposals that are evaluated by a panel of investment professionals. The top five teams will be invited to Atlanta for the final competition in May. The finalists will share an anticipated $20,000 in scholarship prizes as follows:

1st Place: $10,000
2nd Place: $5,000
3rd Place: $3,000
Two Finalists: $1,000 Each

2025 Important dates

Feb. 7 | Declaration of Faculty Coordinator
March 7 | Submissions Due
April 1 | Notification of Finalists
May 1 | Final Competition

https://robinson.gsu.edu/sehfc

CFA Research Challenge

What is the challenge?

The CFA Institute Research Challenge is an annual global competition that provides university students with hands-on mentoring and intensive training in financial analysis and professional ethics. Each student will be tested on their analytical, valuation, report writing, and presentation skills. They gain real-world experience as they assume the role of a research analyst.

https://www.cfainstitute.org/insights/events/research-challenge

LSU Discover Undergraduate Research Program

LSU Discover supports student participation in faculty-mentored research and professional-level activities. They can assist with finding a mentor and exploring undergraduate research opportunities. For students who are currently involved in undergraduate research, we offer funding, workshops, awards, and an annual symposium to present your work. LSU Discover is constantly growing so keep checking back with us for new opportunities and programming.

LSU Discover Day | Undergraduate Research & Creativity Conference
Application deadline: Feb. 28
Event date: April 25

lsu.edu/discover

Dr. Kurtay Ogunc and 2018 Discover Scholarship Awardee, Alyssa Hebert

Accelerated MS Finance Program

Benefits:

- Allows students to obtain graduate credit while still an undergraduate
- Gives students the opportunity to complete both a BS and MS in Finance in 4-4.5 years
- May take up to 18 hours (half required for the MS in finance) while enrolled as undergraduate
- Can take up to the maximum of 15 hours while enrolled in the Seniors for Graduate Credit Program
- Remain eligible to receive TOPS for eight semesters as long as TOPS requirements are met

Contact:
Dr. Cliff Stephens csteph5@lsu.edu for additional information.

Additional Questions?

Contact: Dr. Kurtay Ogunc, PhD, MBA, MApStat

Email: kurtay@lsu.edu

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Department of Finance
Louisiana State University