

CFA INSTITUTE RESEARCH CHALLENGE

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California State University, Fullerton Named Winner of Local CFA Institute Research Challenge

Students advance to the next level of the world's leading investment research competition

CFA Society Los Angeles announced today that California State University, Fullerton has won the local round of the 2022 CFA Institute Research Challenge and will advance to the Regional Semifinals, where they will face other universities from across the Americas Region.

Winning team members, including John Gomez, Connor Joe, Alexandra Mendoza, Eira Tobrand, presented their analysis and buy/sell/hold recommendation on Houlihan Lokey to a panel of distinguished judges from the investment community, including Roberto Hamilton, CFA, Cathy Lloyd, CFA, Doug Loeffler, CFA, and Allan Parks, CFA.

The presentation was the culmination of months of research, interviews with company management, competitors and clients, as well as presentation training. All participating teams received hands-on mentoring, and intensive training in financial analysis and professional ethics delivered through the CFA Institute network, their faculty advisor and a dedicated industry mentor.

“The Institute Research Challenge is a strategically important part of CFA Society Los Angeles’ mission as it allows us to promote the best practices in equity research, as well as provide students with expert mentoring by experienced charterholders,” said Jitendra Motwani, CFA, Senior Vice President, Fixed Income and Equity Analytics at Wilshire Associates, Inc., who co-chairs the Institute Research Challenge Committee at CFA Society Los Angeles. “Hundreds of hours of work on both students’ as well as CFA Society Los Angeles’ behalf culminate into a unique experience for all parties involved. The opportunity for students to meet with industry experts and get career advice is just icing on the cake.”

The following universities also participated in the CFA Institute Research Challenge in Los Angeles: California Lutheran University, California State University Dominguez Hills, Loyola Marymount University, Pepperdine University, and the University of Southern California.

This year’s CFA Institute Research Challenge was hosted by CFA Society Los Angeles and sponsored by Kaplan.

Winners of the Regional Final will advance to the Global Final taking place in New York City on April 22nd.

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About the CFA Institute Research Challenge

The CFA Institute Research Challenge gathers students, investment industry professionals, publicly traded companies, and corporate sponsors together locally, regionally, and globally for an annual competition. In order to promote best practices in equity research and company analysis, students research, analyze, and report on a company as if they are practicing analysts. Local CFA member societies and other affiliated groups host local level competitions of the Research Challenge in conjunction with the participating universities. The universities assemble teams of three to five business and finance students who work directly with a company in researching and preparing a company analysis. The team's final presentations are locally evaluated by high-profile panels of heads of research, portfolio managers, and chief investment officers from the world's top firms. The local champions advance to regional competitions for the Americas, Asia Pacific, and Europe, Middle East, and Africa (EMEA) and then to the Global Final, which will all take place in New York City on April 22nd. Additional information on the Research Challenge is available on the CFA Institute website, www.cfainstitute.org/researchchallenge.

About CFA Society Los Angeles

Founded in 1931, CFA Society Los Angeles is a local member society of CFA Institute, the global association of investment professionals that sets the standard for professional excellence and credentials. The organization is a champion for ethical behavior in investment markets and a respected source of knowledge in the global financial community. The end goal: to create an environment where investors' interests come first, markets function at their best, and economies grow. For more information, visit www.cfala.org.

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