

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 the California State University, Fullerton team continues their winning streak at the local round of the 2024 CFA Institute Research Challenge and will advance to the sub-regional competition where they will face other universities from across the Western US.

Winning team members Bryan Barton, Kyrstin Huxtable, Eric Ramos, Kenneth Sherb, and Blake Wong presented their analysis and buy/sell/hold recommendation on Air Lease Corporation to a panel of distinguished judges from the investment community, including Warren Darakananda, CFA, CPA, Max Seeget, CFA, Deanna Adams, CFA, Ryan Ross, CFA, Richard Barger, CFA, Jason McGorman, CFA, and Nancy Xie, 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 CFA Institute Research Challenge offers a transformative journey for dedicated students to delve deep into equity research and financial analysis. From these students, I see what is discipline, what is dedication and what is perseverance. I'm proud of everyone who can stick to the end of the local competition. This immersive experience not only expands their knowledge base but also helps build the connection with the experienced industry professionals, preparing successful careers in finance in the future.” – Steven Wang, CFA, Co-Chair of the Investment Research Challenge

The following universities also participated in the CFA Institute Research Challenge in Los Angeles:

California State University, Dominguez Hills
California State University, Los Angeles
Loyola Marymount University
Pepperdine University

This year's CFA Institute Research Challenge, in Los Angeles was hosted by the University of Southern California and sponsored by Kaplan Schweser.

Winners of the Regional Final will advance to the Global Final in Warsaw, Poland this May.



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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. 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, Europe, Middle East, and Africa (EMEA) and then to the Global Final, which will all take place the week of May 13 in Warsaw, Poland in May. 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 the CFA Institute, the global association of investment professionals that sets the standard for professional excellence and credentials. The organization is a champion of 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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