



Jitendra Motwani, CFA, Named January Volunteer of the Month



The CFA Institute Research Challenge is an annual global competition that provides university students with hands-on mentoring and intensive training in financial analysis. Student teams research and analyze a publicly traded company, sometimes meeting face-to-face with company management. They then prepare a research report with a buy, sell, or hold recommendation, which they may be asked to present and defend before a panel of industry professionals.

Teams from universities in Southern California owe a lot to our January volunteer of the month, Jitendra Motwani, CFA. Motwani joined CFALA in 2012 after receiving his charter and promptly volunteered to help with the research challenge, first as a mentor and exam proctor and now as committee chair. His role includes selecting appropriate companies, working with students and seven to 10 universities and making sure all the required paperwork is handled correctly.

“The goal of the challenge is to give university student a realistic equity research experience, helping them to learn not only from an academic viewpoint but also in terms of the real world,” Motwani said. “There’s a lot of coordination between the students, the universities and the companies. The process starts in July and goes through February, with the winning team representing CFALA and their university at the national and possibly the global level.”

Motwani, who is manager of a client specialist team at Wilshire Associates in Santa Monica, understands the value of the research challenge.

“I was part of the research challenge myself during my college years and working alongside like-minded students was a very shaping experience for me,” he said. “Having gone through the competition, it seemed natural for me to participate now as a coordinator and mentor. Also the research challenge enables me to serve several different groups at once – CFALA, students, universities and the business community. I like giving back. I also want to take this opportunity to thank Ned Downes and the CFALA staff for their constant support and guidance.”