

# CFA INSTITUTE RESEARCH CHALLENGE

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## **University of Southern California, Marshall School of Business Named Winner of Local CFA Institute Research Challenge in Los Angeles**

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

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CFA Society Los Angeles (CFALA) announced today that the University of Southern California, Marshall School of Business has won the local competition of the CFA Institute Research Challenge and now advances to the Americas Regional where it will compete against universities from the United States, Canada, and Latin America.

The University of Southern California, Marshall School of Business team consists of Kevin Gao, Jack Hussey, Nim Mann, Lucy Qu, and Elliot Schad.

The following universities competed with University of Southern California, Marshall School of Business at the CFA Institute Research Challenge in Los Angeles:

- **Cal Poly San Luis Obispo**
- **Loyola Marymount University**
- **Pepperdine University**

“The CFA Institute Research Challenge is a once in a lifetime experience for each and every student,” said Anil Kapoor, CFA, Co-Chair of the CFALA Institute Research Challenge Committee. “Win or lose, the lessons learned and comradery developed is invaluable.”

Each university sent a team of four to five students to participate in the local challenge. The CFA Institute Research Challenge in Los Angeles was the first step of two for a local team to advance towards the global final in Prague. The students from the University of Southern California, Marshall School will now travel to the Americas Regional competition that will be held in Seattle, WA, USA on 6-7 April 2017 where they will match their wits, analytical skills and presentation abilities against student teams from the Americas. The Global Final will be held on 28 April 2017 in Prague, Czech Republic.

“The CFA Institute Research Challenge is a great initiative by CFA Institute to inculcate the foundations of sound research principles in the students,” explained Jitendra Motwani, CFA, Co-Chair of the CFALA Institute Research Challenge Committee. “Every year, it is extremely satisfying to see future analysts learn the best practices, furthering our belief that the investment profession is in good hands.”

The students presented their analysis and buy/sell/hold recommendations on Bed Bath & Beyond. Their presentation at the CFA Institute Research Challenge in Los Angeles was the culmination of months of research; interviews with company management, competitors, and clients; and presentation training.



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

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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 the same location this year. Additional information on the Research Challenge is available on the CFA Institute website, [www.cfainstitute.org/researchchallenge](http://www.cfainstitute.org/researchchallenge).

### About CFA Society Los Angeles

CFA Society Los Angeles is the 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](http://www.cfala.org).

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## **Media Contacts**

**Laura Carney, Executive Director**

Tel: 213-613-1503 x703

Email: [laura@cfala.org](mailto:laura@cfala.org)

**Jitendra Motwani, CFA**

Tel: 714-244-5500

Email: [jitu@ymail.com](mailto:jitu@ymail.com)



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