

## Finance & Investing



### Program Highlights

- Study the underlying factors that influence publicly traded stock prices, and learn about options, futures and margin trading.
- Analyze P&L and balance sheets to gain useful insights into company valuations and private equity investments.
- Conduct equity research, and value a company using time-tested principles from professional investors.
- Gain valuable insights, and develop an investment pitch for an asset or stock that you believe is greatly undervalued.

### Campus Locations

#### Boston

- July 5–July 17, 2020
- July 19–July 31, 2020

#### Yale University

- June 21–July 3, 2020
- July 5–July 17, 2020
- July 19–July 31, 2020

#### UC San Diego

- July 26–August 7, 2020

### Academic Course Overview

Students will break into teams with each team selecting a promising stock that the team will research throughout the course and ultimately pitch to a group of investors. Faculty will provide hands-on help to students throughout this process. Along the way; students will be introduced to core investment concepts including the characteristics of different asset classes, public vs private equity, the workings of the stock market, company financials, company valuation and portfolio design. By using an experiential learning approach, students will quickly engage in the topic, and the instructor introduces the underlying theory and concepts as students proceed with their project.

### Career Exploration

From investment banking to risk management, there are many career options and opportunities to learn about business models and financial markets while also building new skills. Students will visit an investment company, and hear firsthand details on their investment successes, failures and learnings. Also, an accomplished investment professional will share their personal career path and the wide range of career opportunities in the investment space—from being in the limelight to working behind the scenes.

### Curriculum Advisor - Peter Mombaur, MSE

While instructors vary each year, the Curriculum Advisors ensure continuity in our curriculum. This course was designed by Peter Mombaur. Peter's experience ranges from being a management consultant with McKinsey & Co. to being CEO of

a telecommunications company, and most recently, managing a private equity investment firm. While instructors vary, Peter's breadth of experience adds depth to the curriculum that is taught at each of our campus locations.

### **Instructors**

Courses are taught by accomplished and passionate faculty recruited from many area colleges, universities and professional forums. Each faculty member is selected for their subject area expertise and proven ability to both challenge and captivate students.

### **Tuition**

- **Residential Students:** \$4,998
  - Includes: all meals, lodging, excursions, academic program, weekend excursions
  - Excludes: optional airport pickup and drop off service (available for an additional fee)
  
- **Commuter Students:** \$2,798
  - Includes: academic program, excursions, programming from 9am to 5pm, Monday-Friday
  - Excludes: lodging, breakfast, dinner, weekend excursions
  
- **Extended Commuter Students:** \$3,398
  - Includes: lunch, dinner, excursions, academic program, programming from 9am to 8pm, weekend excursions
  - Excludes: lodging, breakfast