



# FAVORABLE RETURNS

## Support the Red Hawk Student Managed Investment Fund to give students hands-on learning and a network of career success

With a growing record of success, the Red Hawk Student Managed Investment Fund stands out as an experiential learning opportunity for Feliciano School of Business students. The advanced investment course immerses students into the world of investing – and consistently delivers favorable returns in terms of fund value, experiential learning, career success and engaged alumni.

It's a great opportunity for alumni, friends and corporations to get involved. Donations to support the Red Hawk Student Managed Investment Fund add to the investment and help students build their career know-how to launch their investment journey. Plus, the better the fund performs, the more opportunity for students involved to draw on the investment income to enhance the student experience. Students participating in the fund represent a diverse and qualified talent pool, and alumni of the fund remain engaged for networking and mentoring.

### INVESTMENT EXPERIENCE

Launched in fall 2018, the fund gives students a solid foundation in institutional investing and portfolio management and was initiated through the collaboration of alumnus Jim Merli '83, Professor Michael Radin, the Feliciano School of Business Advisory Board and faculty members, along with industry

experts. With an initial investment from the Montclair State University Foundation coupled with student-managed investment returns and generous support from Jim Merli and others, the fund now surpasses \$650,000.

Merli, a member of the Montclair State University Foundation Board as well as the Feliciano School of Business Advisory Board, has been instrumental in steering the fund and its reality-based model. Merli engages Advisory Board members to mentor students and act as a professional sounding board for students giving presentations at semester's end.

The fund has a multi-asset mandate where students invest within and across broad asset classes such as global equities, equity sectors, fixed income and alternative assets. Students learn about alternative strategies in the classroom, research funds and recommend those to consider for the Red Hawk portfolio. These are the same types of investment decisions made by sophisticated university endowments and pension funds. The Red Hawk Student Managed Investment Fund is a sub-account of the overall Montclair State University Foundation endowment, which supports the University's academic programs, research and public service mission.

## A NETWORK OF ALUMNI SUCCESS

Engagement in the program with alumni and friends results in high returns in more than just the investment portfolio. As graduates find professional success, they are paving a path for each other into the competitive world of finance.

A distinction of Montclair's program is that each new cohort inherits the fund from the previous one, so that students can experience fund growth over time. More than 145 students have participated in the program to date. Former students stay involved to see how the fund is performing, resulting in a growing network of alumni who are staying connected and serving as career resources.

## AN IN TO THE INDUSTRY



Through the continuum of fund management, students are helping students. Earnings from the Red Hawk Student Managed Investment Fund enabled class members to attend Quinnipiac University's Global Asset Management Education Forum in New York City in March 2024. It is the largest student-run financial conference in the world, attracting more than 120 universities and 1,300 students to discuss and debate financial best practices with world-renowned industry leaders.



## GET INVOLVED

Investing and getting involved in the Red Hawk Student Managed Investment Fund is a great opportunity for alumni, businesses, corporations and friends to advance student success and build a thriving professional community.

### INVEST

By donating to the Red Hawk Student Managed Investment Fund you will:

- Enrich student development by providing education through hands-on experience
- Help more students experience what it takes to work in investment management
- Give students experience managing a robust, diverse portfolio

### ENGAGE

By engaging with the Red Hawk Student Managed Investment Fund you can:

- Serve as a guest speaker in Feliciano School of Business classes and activities
- Network with a growing group of Red Hawk Student Managed Investment Fund students, graduates and finance professionals
- Recruit diverse talent from a distinctive group of students and alumni

***Be part of this dynamic initiative that gives students an industry edge and pays dividends beyond their college years.***

### CONTACT

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