

CFA Institute Global Research Challenge

“The CFA Institute Research Challenge is an annual global competition that provides university students with hands-on mentoring and intensive training in financial analysis and professional ethics. Each student will be tested on their analytical, valuation, report writing, and presentation skills. They gain real-world experience as they assume the role of research analyst.”

(CFA Institute)

How it Works

- Local level competition organized & judged by CFA Society
- Winning universities from each local competition move onto one of three regional competitions
- Winning teams from the regional competitions move onto the **Global Final**

What did the Project Entail?

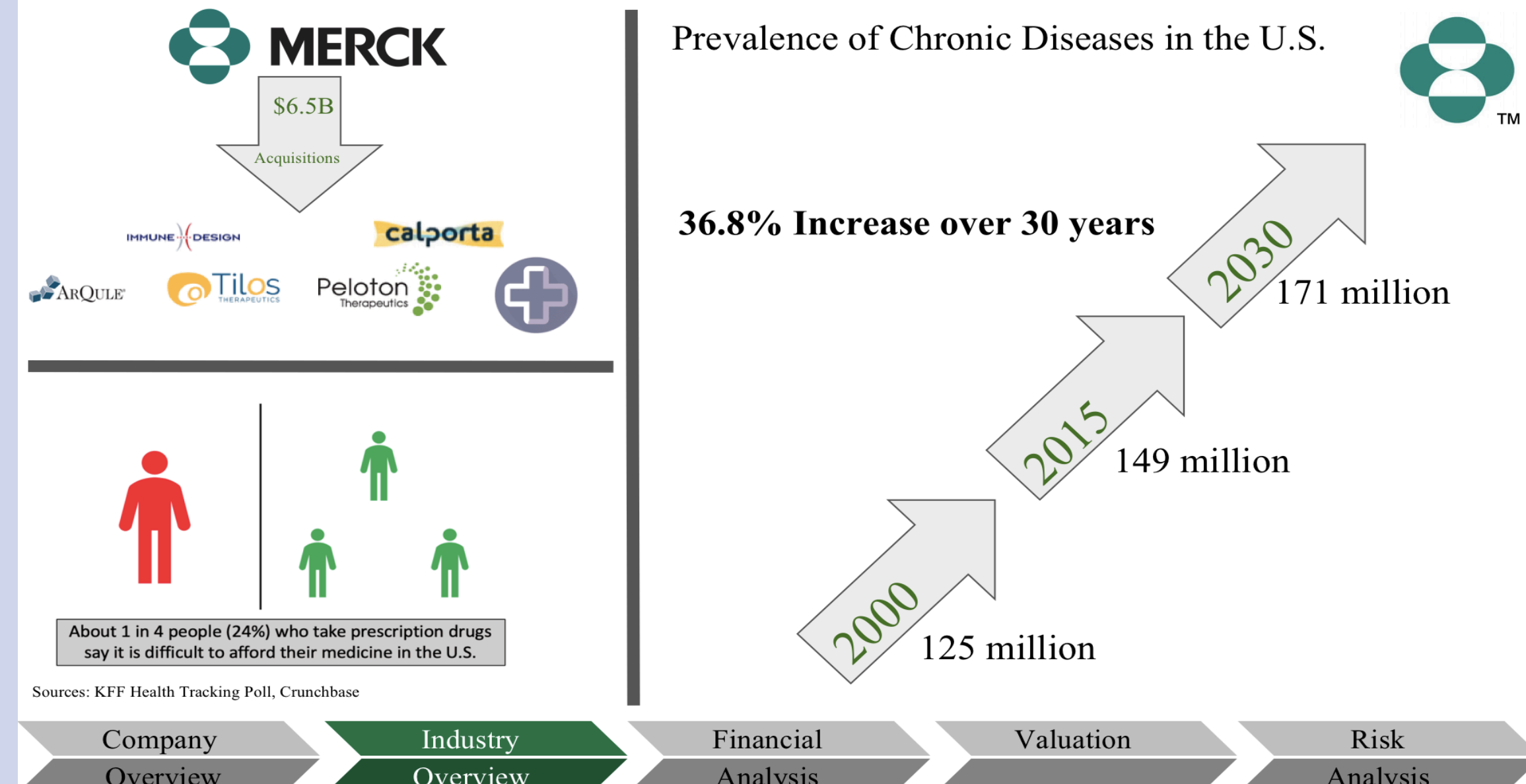
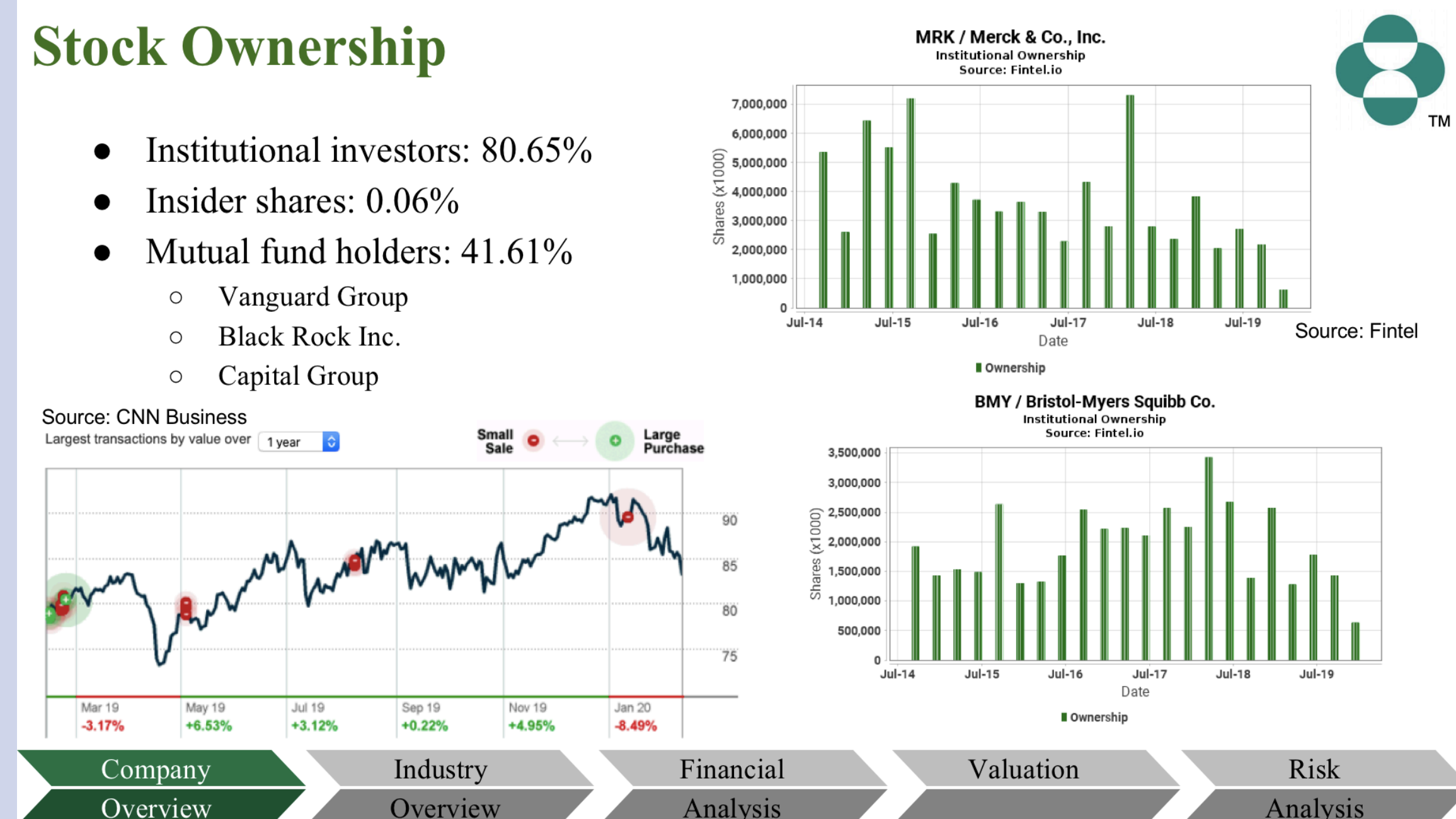
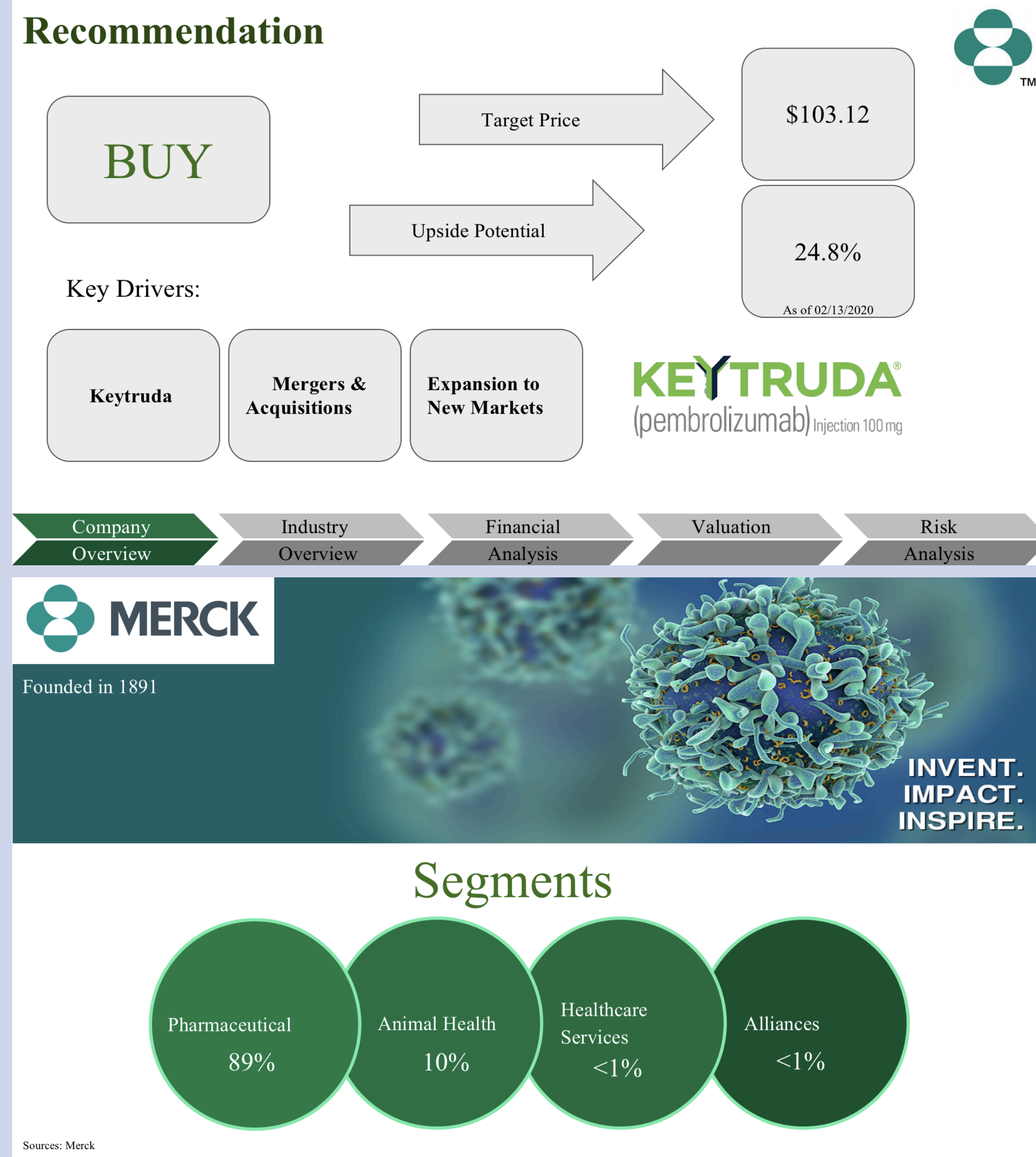
- 20-page equity Research report
- 20 minute slide show presentation justifying our buy recommendation on Merck & Co.

Competition Representation

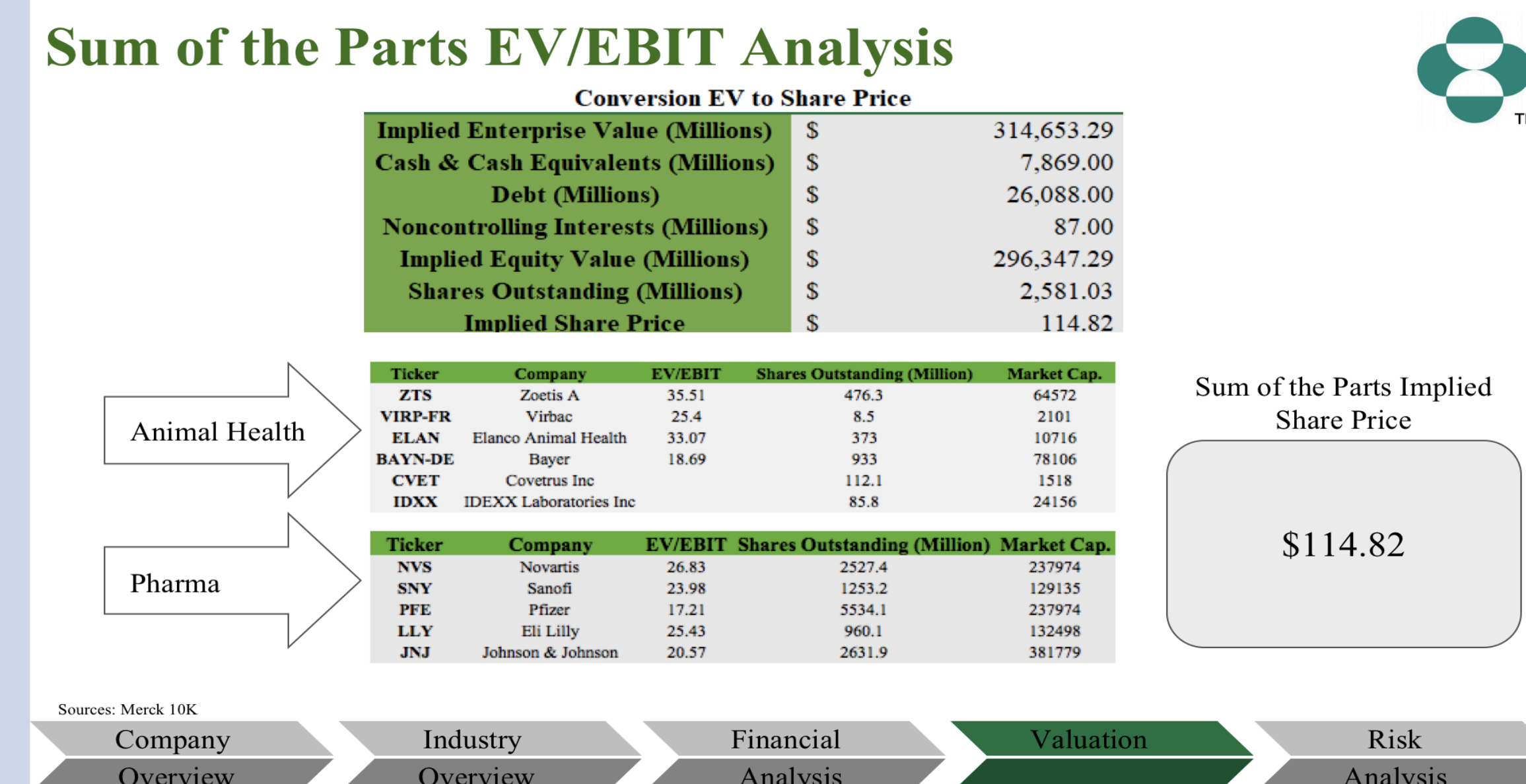
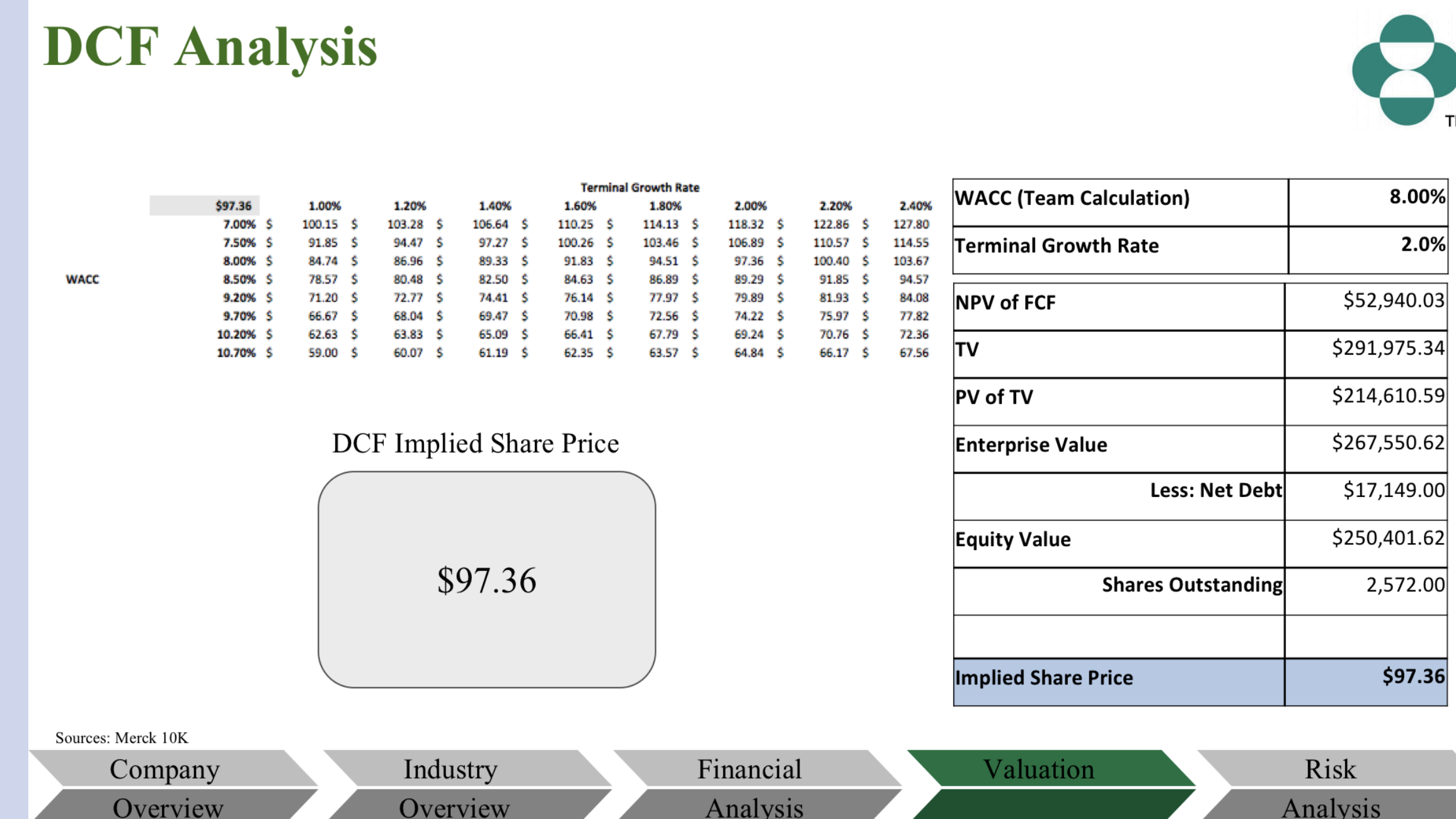
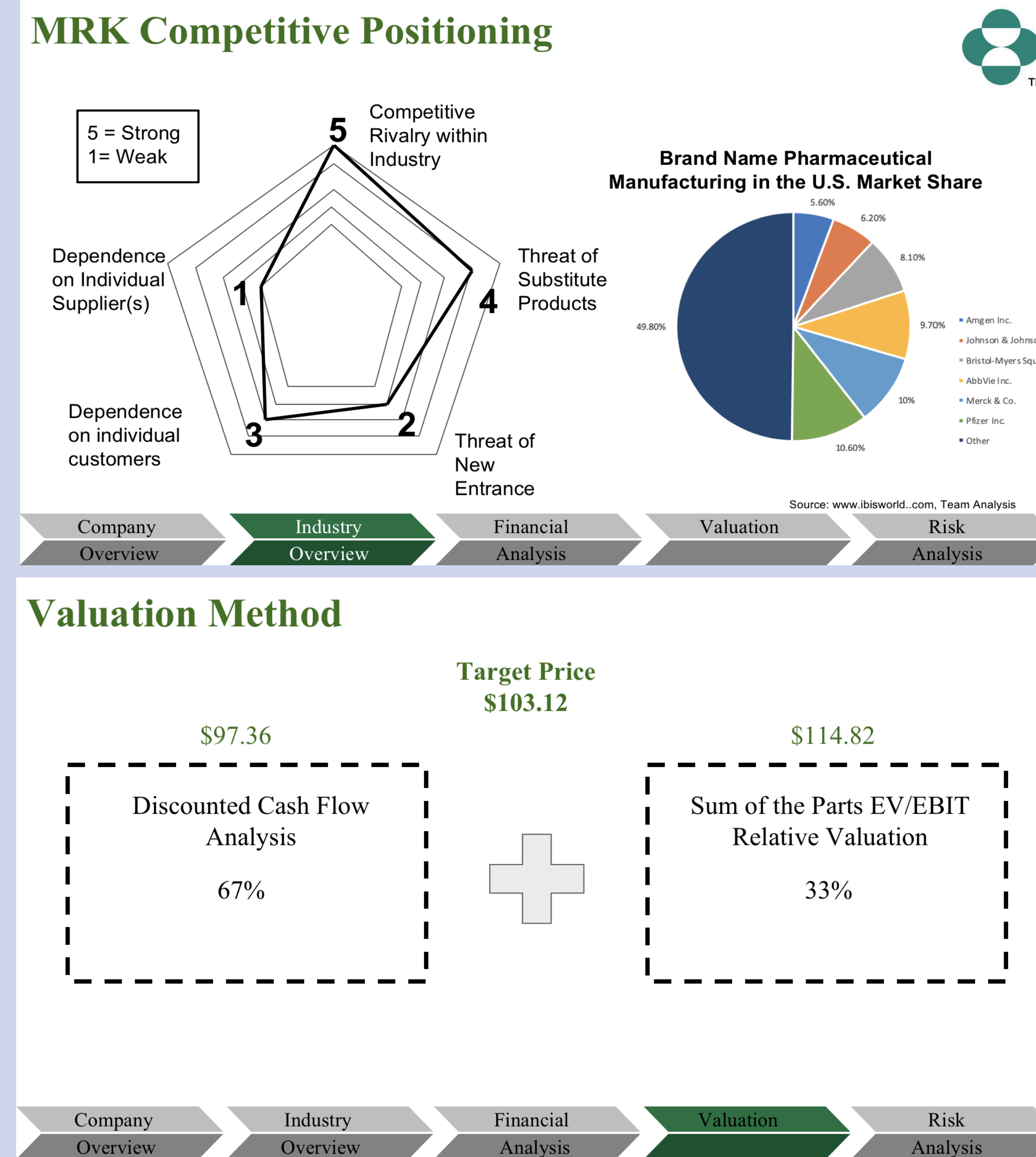
Approximately 100 countries participated

- Columbia University
- Cornell University
- Fordham University
- New York University
- Stevens Institute of Technology
- McGill University
- Concordia University
- American University
- Babson College
- Boston University
- Dartmouth University

Team Analysis



Team Analysis



Biographies

Benjamin Cutler

Ewing, New Jersey

Cutlerb3@tcnj.edu
+1 (609) 578-7439

The College of New Jersey
Bachelor of Science,
Economics

Ben is in his junior year at the College of New Jersey. Currently pursuing a summer internship in finance.

Experience

- CFA Institute Research Challenge (New York, New York)
Team Member (Winter 2019/2020)

KOW Building Consultants (Smithtown, NY)
Intern at KOW Building Consultants (Summer 2018 & 2019)

Skills, Accomplishments, & Interests

- Cumulative GPA: 3.71 / 4.0
- 3rd place winner in Mayo Business Plan Competition 2018
- Executive board member of Financial Management Association & Delta Sigma Pi

Ewing, New Jersey

kruglyl1@tcnj.edu
+1 (973) 997-8740

The College of New Jersey
Bachelor of Science,
Finance

Larry is in his third year at the College of New Jersey. He will be joining J.P. Morgan Asset Management as a Summer Analyst this summer.

Experience

- J.P. Morgan Asset Management (New York, New York)
Incoming Summer Analyst (Summer 2020)

MPI - Business Valuation & Advisory (Princeton, New Jersey)
Valuation Intern (Fall 2019)

Morgan Stanley (New York, New York)
Private Wealth Management Intern (Summer 2019)

National Realty Investment Advisors (Secaucus, New Jersey)
Real Estate Private Equity Intern (Summer 2018)

Skills, Accomplishments, & Interests

- Cumulative GPA: 3.5 / 4.0
- Sis on the Beta Alpha Psi & Order of Omega Honor Societies
- Member of the TCNJ Ice Hockey Team
- National Investment Banking Competition finalist

Christopher Misa

Ewing, New Jersey

misacl@tcnj.edu
+1 (201) 572-9486

The College of New Jersey
Bachelor of Science,
Finance

Christopher is in his fourth year at the College of New Jersey. After graduating this spring, he will be pursuing his Juris Doctorate at Rutgers University Law School in Newark, NJ.

Experience

- CFA Institute Research Challenge (New York, New York)
Team Member (Winter 2019/2020)

Morris Duffy Alonso and Faley (New York, New York)
Intern (Summer 2019)

Klingenstein Fields Wealth Advisors (New York, New York)
Equity Research Intern (Summer 2018)

Skills, Accomplishments, & Interests

- Cumulative GPA: 4.0 / 4.0
- FactSet, CapIQ, Bloomberg Terminal
- Microsoft Excel and PowerPoint
- Yankees, Exercising, Fishing

Joseph Feuerstein

Ewing, New Jersey

feuersj1@tcnj.edu
+1 (973) 936-3830

The College of New Jersey
Bachelor of Science,
Finance

Joseph is in his Sophomore year at the College of New Jersey. He is an investment banking intern at Maxim Group and an incoming investment banking summer analyst at RBC Capital Markets.

Experience

- CFA Institute Research Challenge (New York, New York)
Team Member (Winter 2019/2020)

Maxim Group (New York, New York)
Intern (Spring 2019)

Skills, Accomplishments, & Interests

- Cumulative GPA: 4.0 / 4.0
- FactSet, CapIQ, Bloomberg Terminal
- Microsoft Excel and PowerPoint
- Yankees, Exercising, Fishing

Parmeet Kaur

Ewing, New Jersey

kaup5@tcnj.edu
+1 (732) 668-1165

The College of New Jersey
Bachelor of Science,
Finance

Parmeet is in her third year at The College of New Jersey. After completing her bachelor's degree this fall, she will be pursuing a career in Asset Management.

Experience

- CFA Institute Research Challenge (New York, New York)
Team Member (Winter 2019/2020)

2020 Johnson & Johnson University Case Competition (Ewing, NJ)
Participant (Spring 2020)

Staples (Princeton, NJ)
Senior Marketing Associate (2017-2019)

Skills, Accomplishments, & Interests

- Cumulative GPA: 3.58 / 4.0
- Completed training and certified on the Bloomberg Terminal.
- Member of Financial Management Association and Women in Business on campus.