Sacred Heart University

From the SelectedWorks of Bridget Lyons

November 13, 2014

New Student Investment Club Launches

Available at: https://works.bepress.com/bridget_lyons/21/
New Student Investment Club Launches

Professor John Gerlach analyzes data with students.

News Story: November 13, 2014

Sacred Heart University has launched a new extracurricular student venture where return on investment IS the return on investment! The mission of the SHU Student Investment Club will be to engage students—under the watchful guidance of faculty and professional financial advisers—to make prudent financial investments aimed at enriching the University’s endowment while teaching valuable skills and providing practical hands-on experiences.

The brainchild of SHU Finance Professors John Gerlach and Bridget Lyons, the club is open to interested SHU juniors and seniors pursuing finance degrees at the John F. Welch School of Business. Started with $25,000 in seed money, eight teams of three students each are now working on investment proposals that will be examined by a panel comprising two SHU alumni advisers who are investment professionals and either Gerlach or Lyons. The panel will review the merits of each proposal, examine related research and history with the student teams and then consult with financial analysts from Goldman Sachs.

Sachs also oversees the University’s endowment funds and has made its wide array of investment resources available to the club, including its comprehensive research database.

“This very practical learning will give students relevant, hands-on experience doing research on investment ideas, analyzing the data and recommending an investment course of action to investment professionals,” Gerlach explains. “These opportunities will enable students to be much better prepared for jobs in the financial industry. Additionally, if we reach our goals of achieving a two to three percent above-market return on our investments, it will enhance the University’s endowment fund.”

The longer-term goal, Gerlach added, includes attracting more alumni and students to participate in the club, to eventually encourage alumni investment in club trading and to keep making club activities interesting and challenging for SHU students.