

Spring 2008 PMC Outline/Syllabus

(Subject to change at any time without notice or obligation by PMC, SIG, or any parties affiliated therein)

First EC meeting

- Introduce new chairmen, Addison Tackaberry and Khaled Mustafa
- Introduce last year's chairmen, Brad Needler and Julian Garcia (if present)
- Welcome back all familiar faces
- Touch briefly on work done during Fall semester
- Present "Outstanding Analyst Awards" (or something of that nature) to David Wise (C) and James Spoons (BUD) and stimulate the EC crowd into a raucous applause for these two fine, deserving young scholars (ATTN: ANTHONY – Will you please get the certificate sheets from 177 for us?)
- Talk about the benefits of participating in PMC with regard to supplementing your classroom education, networking with like-minded students and professionals, learning how to invest for your own future and building your resume
- Have sign-up sheet? Tell room number and time of first PMC meeting
- Hand it off to Anthony

First PMC meeting

- Introduce Senior Analysts
- Fill out Member Profiles
- Pass out Value Line Workbooks – work a little bit together
- Show our current portfolio – mention how much cash is available for investment
- Discuss trades made during the Fall in real dollar terms
- Abbreviated presentation by Anthony (ATTN ANTHONY: Can we count on you to be able to do this? If not we'll have someone else present)
- Pass out Value Line S&O section
- Talk about RISE, BA 151, business cards, CFA and our real desire to get some work done this semester. A minimum of 2 presentations will be asked of each team. Teams will be determined next week

**Note to board. I really want PMC and Econ to communicate. It would make intuitive sense if we used their research to guide and focus our own. Last semester there was a real dichotomy, for whatever reason. I will obviously do what I can as Matt and I know each other well, but any way you could help facilitate this interdependency would be great.

Second PMC meeting

- Announce teams – arrange in tables
- Pass out VL S&O
- Review Value Line Workbook and address any questions
- Pass out "SIG Analyst Best Practices" packet, including the PMC ratio handout.
- Begin SSG lesson, pass out all things necessary for that. Have everyone do the same company's SSG for HW so that we can compare answers and make sure everyone is on the same page come week 3.

Third PMC meeting

- Finalize SSG lesson and answer any questions, pass out VL S&O
- Begin 1st educational lesson, perhaps Total Return/Money weighted vs. Time weighted returns
- Guest speaker, Matt, from Econ to give updates and present hot industries to look at for research
- Using Econ guidelines as a start, have everyone go home, do research, and select companies to begin researching in their teams. We'll begin discussing this in Week 4.

End