Supervising a Student Managed Investment Portfolio

Teri Allen

Follow this and additional works at: https://dc.swosu.edu/aij

Recommended Citation
Supervising a Student Managed Investment Portfolio

Ms. Teri Allen
Southwestern Oklahoma State University

This paper discusses how a student-managed investment fund is used in conjunction with a portfolio management course in an effort to offer students real-world experience while students at a regional university. The class and portfolio are supervised by a member of the finance faculty, and investments are processed through a local stock broker. Students are responsible for generating an objective statement for the fund, setting a benchmark for the portfolio, creating an investment strategy, evaluating current holdings, selecting stocks to purchase (or sell), as well as portfolio analysis and evaluation. General guidelines are given for each task, but students retain the majority of the decision making power for the management of the portfolio. Students are evaluated based upon their participation in weekly meetings and online discussions, as well as on outside research, written reports, and presentations to the university foundation.