The Student Investment Association Investment Philosophy

Invest in companies that appear to be undervalued. We invest in companies based off their fundamental values and metrics, not based on momentum or speculation. These companies should have or should be developing a strong competitive advantage. We only invest in companies that meet our criteria, and do not fall outside our metrics. The reasons for purchasing a company should be defined (quantitative and qualitative) at the time of purchase, and should be sold when the company no longer falls in these measures.

The Initial Screen

- Price to Earnings ratio no greater than 20
- Price to Book ratio at or below the industry average
- The Company’s 3 year average Return on Equity should be greater than or equal to industry average

The Goals and Objectives

- The main purpose of the fund is to educate students who participate with real experience of researching and running a fund.
- Prepare students for a career in Wall Street and/or another investment related field.
- Speakers serve to educate students as well as provide networking and job opportunities.