Our Mission

We want to provide the best extra-curricular experience and education in developing finance and investment skills for students of all levels through the pooling of our most valuable resource: our members.

Our Belief

The world of investing is like a puzzle and where each person represents a small but critical piece. By coming together as the Investment Analysis Group, we will be able to obtain a clearer vision of this picture.

Joshua Li
IAG President, 2001-2002

President’s Address

The club is beginning to achieve critical mass, and we must begin to make structured steps towards turning IAG from being just a club to a full-blown organization. Certain steps must be taken in order for us, as the group that will ultimately determine the fate of IAG, to take the club to the next level.

The following two semesters will be very exciting for the club. We are a very talented group with a great deal of determination to make this club a success beyond all means. Most importantly, we are a club where every student is actively involved in every activity that we do. This club can only become better.
IAG Meetings

One of the most important skills for working in the financial industry is having the ability to give flawless presentations. The primary focus of our meetings are stock analyses given by members, after which the floor is opened and other members are welcome to bring up questions and concerns about the company presented. We foster peer-to-peer learning, something that is difficult to accomplish in classes where students are to compete against each other for grades.

Our meetings also include the weekly Market Report put out by our members to inform everyone about the current business environment; updates on the club-sponsored stock market game; various mini-presentations on topics of interest; tell everyone what will be on the next IAG radio show and anything else that may interest our members.

IAG Workshops

Because we have members of different academic backgrounds, we have taken the initiative to help provide the necessary tools for everyone’s participation in our meetings. Throughout our workshops held by senior officers, less experienced members can learn how to make sense of a financial statement and how to get meaning out of the numbers.

Outside of these workshops, senior officers have often held more personal meetings with individual members who are especially enthusiastic. The club is also planning on expanding the coverage of our workshops to advance topics such as risk management and derivatives. The number of facets available to students who wish to learn are limitless.
Looking Forward to This Year

It’s been over five years since we began our journey. Every year, we have done our best to improve on what we had already accomplished. This year, it is not different, yet it is. It’s time for us to gain a greater reach into the world. We’re improving IAG in nearly every aspect possible, such that this year will create a new foundation for the many years to come.

Some initiatives are:

• Trips to NYSE to see trading in action
• Diversification of member populus to include anyone who is interested
• Gain more coverage in the media (such as our appearance on CNN a year ago)
• Find corporate partnerships to acquire more resources
• Have workshops that deal with advanced portfolio management
• Increase participation by freshmen
• Initiate sector analysis coverage

Our members take a great amount of pride in this club. We consider ourselves unique, as we try to provide an experience unlike any other club at Stern. We do not exist only to get our members jobs, rather we are here to provide them with the skills and knowledge that will help them get their own jobs.
Investment Analysis Group

2001-2002 BRIEFING

IAG: Under the Microscope, 2000 - 2001

- Houston Exploration Company (THX)
- Porsche AG (POR3)
- Advanced Micro Devices (AMD)
- Family Dollar Stores (FDO)
- Adobe Systems Incorporated (ADBE)
- Flextronics International (FLEX)
- Functional Genomics (ATHX), (IDPH)
- Nvidia Corporation (NVDA)
- Wal-Mart (WMT)
- Rambus Inc. (RMBS)
- Microsoft .NET Initiative (MSFT)
- Transmeta Corporation (TMTA)
- i2 Technologies (ITWO)
- Intimate Brands Inc. (IBI)
- American Management Sys. (AMSY)
- Collector’s Universe (CLCT)
- AT&T (T)
- Vodafone (VOD)
- Trimble Navigational Systems (TRMB)

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