



2004-2005 BRIEFING

First Meeting: Friday · September 17th, 2004 · 6:00PM · Tisch 200

President's Address

I would first like to welcome the class of 2008 and wish you all the best of luck in your academic careers. Stern can be a challenging school, but with perseverance and dedication, you all can achieve greatness.

That said, greatness often requires the help of others, and that is where the Investment Analysis Group (IAG) fits in. IAG is more than just a club: it is an organization dedicated to helping NYU students learn about everything from financial valuations, to presentation skills, to confidence. Our members come to us with little to no knowledge of finance and presentation skills, and leave with not just a rudimentary knowledge of the aforementioned, but with a skill set that will propel them to excellence.

I myself came to IAG knowing very little about financial valuations, or how to give a compelling presentation, or even how to ask a good question. But with the help of IAG's Administrative Board I have learned more than I could have ever imagined. And my case is by no means unique.

I am very excited about the coming year. With the excellent A-Board that we have in place, I have no doubt that we will outdo last year's record setting performance.

Jeff Galak
IAG President · 2004-2005

Our Mission

IAG strives to provide the best extra-curricular experience and education in developing finance, investment, presentation, and leadership 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.

Portfolio Performance

Initiative Portfolio Return = 62.2%
S&P Return = 12.0%
Portfolio Out Performance: 50.2%

All Star Portfolio Return = 32.3%
S&P Return = 12.1%
Portfolio Out Performance: 20.2%



Investment Analysis Group @ NYU Stern School Of Business

Web: www.stern.nyu.edu/~iag

Email: iag@stern.nyu.edu





2004-2005 BRIEFING

What We Do

The key thing that differentiates IAG from other clubs is that we are entirely based on student participation. Other clubs bring value by inviting speakers from industry to lecture about what it is they do. While this is invaluable when you wish to choose your profession, it does educate you. At IAG we foster peer-to-peer learning, something that is difficult to accomplish in classes where students are to compete against each other for grades.

It is our members that give presentations every week, not professionals. Members volunteer to team up and present a publicly traded company of their choosing. They present a complete business and financial valuation that includes everything from a detailed description of what the company does, to a financial model predicting the price the company's stock.

IAG Meetings

A typical IAG meeting begins on a Friday at 6:00 PM where a member of the Administrative Board gives any necessary updates for that week. This is followed by an update in the standings of the Investment Challenge (a stock market game where teams of IAG members compete on a national level...this is free for members), an update of our two portfolios, and culminating in the presentation of the week. Typically our meetings last about one to one and a half hours, depending on how extensive the post presentation Q&A is. Following our meetings, it is very common for many of our members to go out for food (or drinks if you are of age) afterwards.

IAG Workshops

Without a doubt, one of the best ways for members to learn about finance and presentation skills is to attend our workshops. The topics include "Time Value Of Money", "Financial Accounting", "Financial Valuations", "Presentation Skills", "How to Value a Valuation", and many more. These workshops are an integral part of the education process at IAG.

Outside of these workshops, senior officers have often held more personal meetings with individual members who are especially enthusiastic. The number of facets available to students who wish to learn are limitless.



Investment Analysis Group @ NYU Stern School Of Business

Web: www.stern.nyu.edu/~iag

Email: iag@stern.nyu.edu



2004-2005 BRIEFING

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 initiative are:

- Increased social events
- Paint Ball competition versus Beta Alpha Psi
- Movie Night(s)
- Increased number of workshops
- Initiate sector analysis coverage
- Standardized "1-Pagers" for presentations
- Card reader for member sign in
- Investment Club Conference
- Continue and expand "Lunch With the Portfolio Manager" series
- Better and more diversified food for meetings.

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 @ NYU Stern School Of Business

Web: www.stern.nyu.edu/~iag

Email: iag@stern.nyu.edu

STERN IAG



2004-2005 BRIEFING

IAG: Under the Microscope



Take Two Interac-
tive (TWO)



Orthodontic Centers
Of America (OCA)



The Investment Man-
agement Industry



The Keith Compa-
nies (TKCI)



eBay Inc. (EBAY)



Shell Transport &
Trading (SC)



Johnson & Johnson
(JNJ)



Royal Caribbean
(RCL)



Regis (RGS)



Family Dollar
Stores (FDO)



Rubios (RUBO)



Onvia (ONVI)



AU Optronics
(AUO)



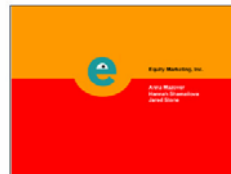
UTStarcom (UTSI)



Coach (COH)



Limited Brands
(LTD)



Equity Marketing
(EMAK)



Bed Bath & Beyond
(BBBY)



Anheuser Busch
Companies (BUD)



Walmart (WMT)



Investment Analysis Group @ NYU Stern School Of Business

Web: www.stern.nyu.edu/~iag

Email: iag@stern.nyu.edu

