

FOX FUND: ANALYST APPLICATION FORM

The TUIA Fox Fund—prerequisite for the William C. Dunkelberg Owl Fund—is a virtual equity portfolio formed to introduce and educate interested students on the various investment principles and methodologies implemented in the Owl Fund to identify attractive investments. The Fox Fund is led by former Owl Fund graduating seniors (Tarun Sangari and Trevor Lohman) and advised by the Owl Fund Managing Director, Dr. Jonathan Scott.

Selected students are taught how to find “undervalued” stocks, work with industry software such as S&P Capital IQ, FactSet and Bloomberg Professional, and are educated on all relevant knowledge used to compose an investment thesis and the subsequent initiating coverage reports. The first half of the Fox Fund is dedicated to education; meetings will consist of interactive lectures, in class activities and three take home assignments. In the second half of the semester, students are broken up into “sectors” of the S&P 500 (e.g., Healthcare, Financials, etc.) and work with their team to formulate an investment thesis, write a report, and present their thesis to the Fox Fund and members of the Owl Fund. The Fox Found meets MWF from 4:30-5:20pm in the Capital Markets Room (CMR; Alter 132) and are expected to dedicate sufficient time outside of normal meeting hours to complete all assigned tasks.

Interested members of the Temple University Investment Association (TUIA) should submit the following application at **(i) any weekly TUIA meeting**, or **(ii) to Department of Finance Office in Alter 401A**. Electronic applications will NOT be accepted.

Applications are due **on or before Friday, September 14th** and meetings will begin September 17th.

Fall 2018

Name (First Last): _____

TUID: _____ Email: _____@temple.edu

Major(s): _____ Total Credit Hours Taken: _____ GPA: _____

Accessnet Username (tuf03561): _____ Expected Graduation: _____

Courses Completed as of End of This Semester:

Financial Accounting (ACCT 2101) Financial Management (FIN 3101)

Previous Fox Fund Experience: Last Semester Two Semesters Ago Three Semesters Ago

If applicable, list previous sector assignments: _____ - _____

Sector Preference (Pick 3; not guaranteed):

Consumer Financials Energy/Utilities Healthcare Industrials / Materials Technology

Are you a member of Fox / Temple Honors? Yes No

Are you planning on interviewing for the **Spring 2019** Owl Fund class? Yes No

Are you planning on interviewing for the Owl Fund in the future? Yes No

Applicant Signature: _____ **Date:** _____

PLEASE ANSWER THE FOLLOWING QUESTIONS:

1. Discuss and elaborate on what you hope to learn and gain from being an analyst in the TUIA Fox Fund. What is your ideal entry-level job and how can the Fox Fund help you attain the proper skills to achieve that job?

2. List relevant investment / internship / leadership experiences you may have and explain why they make you the right fit for the Fox Fund. Please indicate if you have accepted an internship for Summer 2019.

3. What is your outlook on the equity markets right now? What S&P500 company would you recommend a BUY on and why? What S&P500 company would recommend a SELL on and why?

4. What is one fun fact about you?

FEEL FREE TO INCLUDE ANY OTHER RELEVANT ATTACHMENTS (EX: RESUME)

Questions? Contact any of the following Fox Fund instructors:

Tarun Sangari (tsangari@theowlfund.com)

Trevor Lohman (tlohman@theowolfund.com)