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[News](#)

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California Polytechnic State University

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Contact: Teresa Hendrix

(805) 756-7266

Cal Poly Business Students Take Second in National Investment Management Competition

A team of undergraduate students from Cal Poly's Orfalea College of Business took second place in a national investment management competition.

Cal Poly's Student Managed Portfolio Project (SMPP) team placed second in competition at the second "RISE-Redefining Investment Strategy Education" Symposium and Portfolio Competition Feb. 23 - 24 at the University of Dayton, Ohio.

The competition involved 33 universities from across the nation with student managed portfolio projects similar to Cal Poly's. The Cal Poly SMPP team, under the guidance of Finance Professor John Lindvall, manages about \$500,000 of the Cal Poly Foundation's endowment funds. From Dec. 1, 2000 to Nov. 30, 2001, the Cal Poly SMPP fund earned 0.1%, compared to a loss of 13.3 percent for the S&P 500, and a NASDAQ loss of 25.7 percent

For the RISE competition, the Cal Poly student team had to assemble a detailed report on the SMPP's holdings, gains and losses over those 12 months in order to make the finals. The competition offered three fund management categories: value, growth, and blend. Cal Poly competed in a field of 11 teams in the blend category and was among the top five chosen to go on to the finals.

A panel of investment professionals judged the team finals. The performance of the funds counted for 50 percent of the judging criteria; the other 50 percent was based on presentations made at the competition.

In the finals, Cal Poly's SMPP team placed second, behind Michigan Tech. Winners in the other two categories included Purdue University in the growth category and Stetson University in the value category.

The Cal Poly team members are business seniors Ian Bronson, Nicole Collette, Matt Mahlman and Dan Pavlinik, coached by Finance Professor

Larry Gorman. The national second-place win is especially impressive, Gorman said, because many other colleges fielded investment teams managed by graduate MBA students, while Cal Poly's team is comprised entirely of undergraduate students.

-30-

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Cal Poly Public Affairs

California Polytechnic State University

San Luis Obispo, CA 93407

805.756.7266

polynews@calpoly.edu