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Contact: Robyn Kontra
805-756-5331; rkontra@calpoly.edu

Cal Poly Students Win Second Consecutive Local CFA Institute Research Challenge

SAN LUIS OBISPO — A team of Cal Poly Orfalea College of Business students has won the local CFA (Chartered Financial Analyst) Institute Research Challenge for the second consecutive year.

Finance seniors Erin Averill, Robert Ricci, Divyan Waland, Aaron Hay and Nate Fisher represented Cal Poly at the event in Los Angeles. The students were advised by Finance area Chair Cyrus Ramezani, San Luis Obispo financial advisor Phillip Cohl, and 2005 Cal Poly finance alumnus Scott B. Kirk. David Larsen, 2014 information systems alumnus and captain of last year's winning team, also advised the group.

The Cal Poly students competed against teams from the College of the Canyons, Claremont Graduate University, UC Santa Barbara, and USC. The competing teams were charged with analyzing and making buy/sell/hold recommendations for The Walt Disney Co.

Cal Poly's team advances to the Americas Regional competition in April in Atlanta, where it will compete against universities from the U.S., Canada and Latin America. The winners of the three regional competitions (Americas; Europe, the Middle East and Africa; and Asia Pacific) will compete in the Global Final.

"This was a true team effort. Our success is the result of more than 300 hours of focused research and analysis by our students," said Ramezani. "Our second consecutive win is a tribute to our finance faculty who provide the educational challenges that enable our students to shine in this competition. We're proud to represent Cal Poly's Learn by Doing philosophy in Atlanta."

The CFA Institute Research Challenge provides an opportunity for students to learn from industry experts and compete with other top finance programs. The event promotes best practices in equity research among the next generation of analysts through hands-on mentoring and intensive training in company analysis and presentation skills. Participants are introduced and held to the standard of the CFA Institute Code of Ethics and Standards of Professional Conduct.

For more information about the CFA Institute Research Challenge, go to: cfainstitute.org/community/challenge/Pages/index.aspx.

About the Orfalea College of Business and Cal Poly

The Orfalea College of Business, one of six academic colleges at Cal Poly, is a nationally ranked, four-year, comprehensive public university in San Luis Obispo. Cal Poly is a distinctive learning community offering academically focused students a hands-on educational experience that prepares them for today's scientific and technical world. For more information, visit www.cob.calpoly.edu.

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Phone: 805-756-1111