

Student Investment Fund Newsletter- Fall 2025

1 message

CSU East Bay College of Business & Economics <cbe@csueastbay.edu>
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To view this email as a web page, go [here](#).**Join us at the Fall 2025 Advisory Board Meeting**

Dear CBE Dean's Office,

This is an invitation to all former and future SIF students!

This semester, we will meet in VBT 126 on Wednesday, December 3, from 11 AM-1 PM. Please email Professor Brian Du, brian.du@csueastbay.edu if you would like to attend remotely via Zoom.**History of the Student Investment Fund**

The Cal State East Bay Student Investment Fund was established in May 2022 through the generous contributions of \$277,000 from alumni **Ken Pereira**, **Mike Coke**, and **Michael Dance**. In 2024, renowned investor **Louie Navellier** pledged \$20,000 per year to help cover the fund's operating expenses, ensuring that more of the portfolio's growth can directly support student learning and scholarships.

The Student Investment Fund was founded with a dual mission:

- Empower students by providing hands-on investment experience, developing real-world skills, and bridging academic learning with practical decision-making.
- Promote a culture of giving back by supporting future generations of students — with 5% of the fund's net assets awarded annually as student scholarships.

SIF Advisory Board Members

Mr. Mike Coke- President and CEO of Terreno Realty; donor
 Dr. Eric Fricke- Professor of Finance
 Dr. Scott Fung- Professor of Finance
 Dr. Sinan Goktan- Professor of Finance
 Dr. Tina Lang- Assistant Professor of Accounting
 Mr. Louie Navellier- Chairman and Founder of Navellier & Associates; donor
 Mr. Ken Pereira- Retired CFO of SteelRiver Infrastructure Partners; donor
 Dr. Kourosh Shafi- Associate Professor of Management

Current SIF Portfolio

Ticker	Company Name	Sector	Industry
AAPL	Apple Inc.	Information Technology	Technology Hardware, Storage and Peripherals
AMAT	Applied Materials, Inc.	Information Technology	Semiconductors and Semiconductor Equipment
AMZN	Amazon.com, Inc.	Consumer Discretionary	Broadline Retail
AXON	Axon Enterprise, Inc.	Industrials	Aerospace and Defense
BAC	Bank of America Corporation	Financials	Banks
BLK	BlackRock, Inc.	Financials	Capital Markets
BRK.B	Berkshire Hathaway Inc.	Financials	Financial Services
CF	CF Industries Holdings, Inc.	Materials	Chemicals
CMCSA	Comcast Corporation	Communication Services	Media
CME	CME Group Inc.	Financials	Capital Markets
COF	Capital One Financial Corporation	Financials	Consumer Finance
COKE	Coca-Cola Consolidated, Inc.	Consumer Staples	Beverages
COST	Costco Wholesale Corporation	Consumer Staples	Consumer Staples Distribution and Retail
CSX	CSX Corporation	Industrials	Ground Transportation
DE	Deere & Company	Industrials	Machinery
FTNT	Fortinet, Inc.	Information Technology	Software
GIS	General Mills, Inc.	Consumer Staples	Food Products
GOOGL	Alphabet Inc.	Communication Services	Interactive Media and Services
IDXX	IDEXX Laboratories, Inc.	Health Care	Health Care Equipment and Supplies
INTU	Intuit Inc.	Information Technology	Software
LMAT	LeMaitre Vascular, Inc.	Health Care	Health Care Equipment and Supplies
LMT	Lockheed Martin Corporation	Industrials	Aerospace and Defense
LNTH	Lantheus Holdings, Inc.	Health Care	Health Care Equipment and Supplies
MA	Mastercard Incorporated	Financials	Financial Services
META	Meta Platforms, Inc.	Communication Services	Interactive Media and Services
MS	Morgan Stanley	Financials	Capital Markets
MSFT	Microsoft Corporation	Information Technology	Software
NFLX	Netflix, Inc.	Communication Services	Entertainment
NOW	ServiceNow, Inc.	Information Technology	Software
NUE	Nucor Corporation	Materials	Metals and Mining
NVDA	NVIDIA Corporation	Information Technology	Semiconductors and Semiconductor Equipment
OC	Owens Corning	Industrials	Building Products
PAYC	Paycom Software, Inc.	Industrials	Professional Services
PG	The Procter & Gamble Company	Consumer Staples	Household Products
QLYS	Qualys, Inc.	Information Technology	Software
SBUX	Starbucks Corporation	Consumer Discretionary	Hotels, Restaurants and Leisure
SFM	Sprouts Farmers Market, Inc.	Consumer Staples	Consumer Staples Distribution and Retail
TMO	Thermo Fisher Scientific Inc.	Health Care	Life Sciences Tools and Services
TRV	The Travelers Companies, Inc.	Financials	Insurance
ULTA	Ulta Beauty, Inc.	Consumer Discretionary	Specialty Retail
UNH	UnitedHealth Group Incorporated	Health Care	Health Care Providers and Services
UTHR	United Therapeutics Corporation	Health Care	Biotechnology
VZ	Verizon Communications Inc.	Communication Services	Diversified Telecommunication Services
WIM	Waste Management, Inc.	Industrials	Commercial Services and Supplies
WSM	Williams-Sonoma, Inc.	Consumer Discretionary	Specialty Retail

Student Recommendations for Fall 2025

Buy Recommendations:

APH Amphenol Corporation
 AVGO Broadcom Inc.

RL	Ralph Lauren Corporation
CASY	Casey's General Stores, Inc.
MCK	McKesson Corporation
IBKR	Interactive Brokers Group, Inc.
BWXT	BWX Technologies, Inc.

Sell Recommendations:

VZ	Verizon Communications Inc.
SBUX	Starbucks Corporation
GIS	General Mills, Inc.
LNTH	Lantheus Holdings, Inc.
BAC	Bank of America Corporation
LMT	Lockheed Martin Corporation

A Heartfelt Thank You to Our Guest Speakers



The Student Investment Fund was thrilled to welcome back renowned investor Mr. Louis Navellier for the fifth consecutive semester. Each session, Mr. Navellier brings an unmatched depth of experience and enthusiasm, sharing stories from his career, lessons in disciplined investing, and timely perspectives on the market. His ongoing generosity and mentorship continue to inspire our students to think critically and invest with purpose. We are deeply grateful for his ongoing support and the lasting impact he has on our learning community.

Inside the Fund: Hear from Current Students

The SIF class was a grind that will always pay off, the dedication that this class requires has made a long-lasting impression and sets a bar for future experiences. By far, this was one of the best experiences in my educational career. As a student, gaining the real world experiences that this class offers is an exceptionally limited opportunity and is treated as such. There is no BS-ing in this course and all expectations are on the student to perform. The skills that come from it, however, will last a lifetime even for someone like myself who's had few experiences in finance. If you have the ability to take this course, do it!

- Thomas Brackett

The Student Investment Fund class is a challenging course, but it is absolutely worth taking because it builds real-world skills that students can't get from a typical classroom. In this class, I learn how to analyze companies, work with advanced Excel models, and present investment recommendations confidently in front of large groups—just like professionals in finance. The experience of researching stocks, debating ideas with teammates, and ultimately selecting the right investments for the school's portfolio helps students develop critical thinking, communication, and technical skills that are directly valuable for internships and future careers. Even though the workload is demanding, in my opinion, the growth and confidence students gain make the course truly rewarding.

-An Dang

This class has honestly been one of the most hands on and practical courses I've taken. I actually learned how to think like an investor, not just memorize terms or formulas. Building models, doing research, and working through financials made me realize how much detail goes into every investment decision. It was challenging, but in a good way, the kind that makes you feel proud of how much you've grown by the end.

- Alexa Eichenlaub

This course helped me build real confidence in my financial skills. Instead of memorizing theories, we applied concepts directly through hands-on analysis and real-time decision-making. It felt less like a typical class and more like stepping into a professional role. This class also strengthened my attention to detail, ensuring that every analysis and decision was supported by accurate and thoughtful work.

-Anthony Eskridge

Joining the Student Investment Fund has allowed me to grow my finance skills far beyond what I imagined. Through hands on financial analysis, equity research, and advanced Excel modeling, I've learned how to evaluate companies the same way professionals do. This class pushes you to think critically, collaborate with a team, and make data-driven investment decisions, ultimately preparing you for real-world finance roles and responsibilities.

-Sean Lee

This student investment fund class is unlike any other class I have ever taken, in the best way possible. There are no tests or quizzes, and yet I learned and improved on many life skills that I will carry with me into the future. This includes patience, attention to detail, and learning how to deal with frustration. On top of that, Professor Du not only taught me how to invest in myself financially, but he also gave tips on how to invest in myself health-wise. With that being said, this class is not solely about finances but rather goes above and beyond what you would expect to gain from a course. Students also get to improve on their public speaking skills, which is extremely important to progress in any career. I recommend anyone to take this class as not only will it look great on your resume, but it truly teaches you valuable financial and life skills.

- Francesca Martinez

I am grateful for to have been in this opportunity. The Student Investment Fund not only honed my critical thinking and eye for detail, but this hands on course allowed so many of my colleagues and I to get a better understanding of field of finance. Professor Du's mentorship is also a key factor of this course. It's more than apparent the professor takes great pride in teaching students knowledge that will build their foundation in not only their career, but overall life. I am also grateful to the board for allotting time for us to present our stock picks. There's also the fact that the Professor put his trust in students like myself to work with a fund that is generates scholarships for my peers who will attend Cal State East Bay. Taking this course has been a privilege that I will never forget! For any anyone ready to better themselves in their health, career, finance, or even their analytical skills apply for the Student Investment Fund!

- Brandon May

Being part of the Student Investment Fund has been a truly valuable experience that allowed me to apply my background in statistics and data science to real-world financial decision-making. The course strengthened my ability to analyze data, interpret market trends, and contribute meaningfully to investment discussions. It challenged me to step outside my comfort zone while significantly improving my Excel and analytical skills in a practical, hands-on environment. Professor Brian Du's guidance and dedication played a major role in this learning process. His passion for teaching, attention to detail, and willingness to support students at every step made the class both engaging and impactful. Through his mentorship, I gained not only technical knowledge but also the confidence to approach complex financial problems with clarity and purpose. SIF has deepened my interest in finance and provided a strong foundation for my future in data-driven and financial roles.

- Swapnil Mhatre

This is one of the few courses that actually improve my experience in the finance major. It provides a real-world assignment that has developed my skills and knowledge in financial data through quantitative and qualitative analysis. This course is worth investing in and represents a good opportunity to gain hands-on experience with Microsoft Excel and S&P 500 IQ. This is a must-enroll financial elective course for every finance student.

- Tuan Nguyen

Taking the Student Investment Fund course was such a rewarding experience. Coming from a marketing background, I really wanted to challenge myself and grow in areas like data analysis and Excel—and this class made that happen. I was able to strengthen my technical skills and become much more confident working with data. It was a very detail-oriented course, but in a way that felt different and refreshing from what I was used to. I also really appreciated the emphasis on feedback. It was incredibly helpful, especially with the kind of detailed, hands-on work we did throughout the semester. I learned a great deal about both quantitative and qualitative analysis, and now have a deeper understanding of how to interpret reports and apply insights in a meaningful way. Professor Du's willingness to help and his passion for teaching made a big difference. He created an environment where learning felt both challenging and supportive. Overall, this class enhanced my confidence, refined my Excel and analytical skills, and instilled in me a new appreciation for the level of detail that goes into financial analysis.

- Jazmin Ortiz

Finally, a class that gives you real-world professional experience you can actually use beyond the classroom! In the Student Investment Fund, you are treated like a financial analyst all semester, so staying on top of deadlines and attending every class is essential. You also get to hear from amazing guest speakers like Mr. Louie Navellier and present your analysis to the board members at the end of the semester, which is a unique experience that looks great on a resume for anyone pursuing a career in finance. Professor Du is fantastic. After taking his Corporate Finance class last semester, I was encouraged by his teaching style and passion to enroll in SIF, and it has easily become my favorite class. On top of that, it fulfills the Writing requirement for graduation which makes it a no-brainer for students who want hands-on finance experience while improving their communication skills.

- Omar Qutob

Without a doubt one of my favorite classes I have taken as a student studying finance. Usually in college you apply theories in a hypothetical/simulated sense, but with the Student Investment Fund course you have a real impact on the analysis and stock recommendation you provide. I feel like I have developed real hard and soft skills through this course, which I am ecstatic to share with future employers. Thank you to the donors, the SIF board members, and Prof. Du for this opportunity; I am extremely grateful that I had the pleasure of participating in something like this.

- Angelo Sepulveda

It's common for most students to come to their college classes and question if they're ever going to use the material they're learning in the real world and for the most part, they're right. However The Student Investment Fund is one of the few classes where you're in the shoes of a real world financial analyst and doing meaningful work. Most finance classes in college are based on theory and textbook material, however in this investment fund, you have the freedom to pitch a stock of your choice based on your own reasoning and research rather than being told what to do. It's also extremely rewarding knowing that you're working with real money, gaining real experience, and making an impact to future scholarships with the company you're pitching.

- Justin Tran

Every class felt meaningful because I was learning practical skills that I can actually apply when investing. Professor Du had us work with real companies and real data, which made everything feel a lot more practical and engaging. Analyzing actual reports helped me understand how classroom concepts turn into real decisions and how to let my money work for me. The teamwork in this program made the experience more collaborative, and I learned a lot from my team members' different perspectives. I am truly grateful for this opportunity and the SIF program.

- Siqi Wu

SIF Finance Club Investment Conference

THE STUDENT INVESTMENT FUND FINANCE CLUB



GUEST SPEAKERS

INVESTMENT CONFERENCE

w/ THE STREET SMARTS

24TH
OCTOBER
11:00AM-2:00PM
IN VBT ROOM 216

MORE INFO

- Gain Financial Insight: Understand the economy, markets, and investment strategies.
- Explore Careers: Learn from professionals about finance opportunities.
- Build Connections: Network with peers and industry leaders.

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MICHAEL D
CAMPBELL
CEO & Founder



On October 24th, the Student Investment Fund Finance Club successfully hosted its inaugural boutique Investment Conference, attracting a strong turnout of business students. The three-hour event featured an agenda on topics related to the capital markets, career advice, and the effects of AI in traditional finance roles. Students enjoyed pizza and snacks while hearing from an impressive lineup of industry professionals, including **Michael D. Campbell**, CEO & Founder of The Street Smarts; CFO and Controller **Mike Bilby**; Managing Director and business owner **Scott Reising**; and **Jack Amidon**, CFO of Kingsford Capital.

The conference was not only educational but also allowed students to network, ask questions, and connect with their peers and mentors who are looking to jumpstart their journey or have already built a proven track record in the finance industry. We would like to thank our distinguished guests for taking the time out of their busy schedules to share their knowledge and support the next generation of students.

- Justin Tran, Student President of SIF Finance Club





SIF Performance (as of November 1, 2025)

The Student Investment Fund portfolio stands at \$588,316. Since inception, the Fund has distributed a total of \$47,052 in student scholarships, directly supporting the next generation of students.

Cumulative contributions total \$433,520, while investment earnings have reached \$154,796, representing a total return of 58.07% since inception. Over this same period, the S&P 500 has returned 68.78%, with a comparable monthly volatility of 4.44% versus the Fund's 4.38%.

These results highlight the Fund's ability to deliver strong, risk-adjusted performance while fulfilling its educational and philanthropic mission.

Year	Returns			Volatility	
	<u>SIF</u>	<u>S&P500</u>	<u>Alpha</u>	<u>SIF</u>	<u>S&P500</u>
2022	-1.31%	-7.06%	5.75%	7.14%	6.92%
2023	20.85%	24.23%	-3.38%	3.94%	4.06%
2024	17.97%	23.45%	-5.48%	2.93%	2.91%
2025	12.34%	16.31%	-3.97%	3.12%	3.26%
Since Inception	58.07%	65.78%	-7.71%	4.38%	4.44%



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