



Join the Spring 2025 Advisory Board Meeting

Greetings %%First Name%%,

The Student Investment Fund is continuing to grow and we're excited to share updates on this Spring semester with you.

We would like to invite all former and future SIF students to attend our upcoming Spring Advisory Board meeting. It will be on Tuesday, May 13, from 12:45-2:45 PM in VBT 126. If you'd like to attend remotely via Zoom, please [contact me](#).

Best regards,
Professor Brian Du

History of the Student Investment Fund



Cal State East Bay's Student Investment Fund was established in May 2022 through the generous contributions of \$277,000 from alumni Mike Coke, Michael Dance, and Ken Pereira. Mike Coke, President and co-founder of Terreno Realty Corp., credits part of his post-graduation success to the skills and knowledge acquired during his undergraduate experience at our university.

The Student Investment Fund serves a dual purpose. First, it enriches student education by providing hands-on experience in financial decision-making and teaches critical aspects of investment analysis and portfolio management. Second, it instills the value of philanthropy and the importance of giving back by sharing success. Each year, 5% of the fund's net assets are distributed back to students in the form of scholarships.

SIF Advisory Board Members

We welcome our newest Board member – Professor Kourosh Shafi!

Dr. Ching-Lih Jan- Professor and Department Chair of Accounting and Finance
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
Dr. Kourosh Shafi- Assistant Professor of Management
Mr. Mike Coke- President and CEO of Terreno Realty; donor
Mr. Ken Pereira- Retired CFO of SteelRiver Infrastructure Partners; donor
Mr. Louis Navellier- Chairman and Founder of Navellier & Associates; donor

Current SIF Portfolio



STUDENT INVESTMENT FUND



Current Holdings

Ticker	Company Name	Sector	Industry
A	Agilent Technologies, Inc.	Health Care	Life Sciences Tools and Services
AAPL	Apple Inc.	Information Technology	Technology Hardware
AMAT	Applied Materials, Inc.	Information Technology	Semiconductors
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
CF	CF Industries Holdings, Inc.	Materials	Chemicals
CMCSA	Comcast Corporation	Communication Services	Media
COF	Capital One Financial Corporation	Financials	Consumer Finance
COKE	Coca-Cola Consolidated, Inc.	Consumer Staples	Beverages
COST	Costco Wholesale Corporation	Consumer Staples	Consumer Retail
CSX	CSX Corporation	Industrials	Ground Transportation
DE	Deere & Company	Industrials	Machinery
GIS	General Mills, Inc.	Consumer Staples	Food Products
GOOGL	Alphabet Inc.	Communication Services	Interactive Media and Services
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
LULU	lululemon athletica inc.	Consumer Discretionary	Textiles, Apparel and Luxury Goods
LYV	Live Nation Entertainment, Inc.	Communication Services	Entertainment
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
NUE	Nucor Corporation	Materials	Metals and Mining
NVDA	NVIDIA Corporation	Information Technology	Semiconductors
PG	The Procter & Gamble Company	Consumer Staples	Household Products
QLYS	Qualys, Inc.	Information Technology	Software
SBUX	Starbucks Corporation	Consumer Discretionary	Hotels, Restaurants and Leisure
TGT	Target Corporation	Consumer Staples	Consumer Retail
TMO	Thermo Fisher Scientific Inc.	Health Care	Life Sciences Tools and Services
TNET	TriNet Group, Inc.	Industrials	Professional Services
TRV	The Travelers Companies, Inc.	Financials	Insurance
TXN	Texas Instruments Incorporated	Information Technology	Semiconductors
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	Telecommunication Services
WM	Waste Management, Inc.	Industrials	Commercial Services and Supplies
WSM	Williams-Sonoma, Inc.	Consumer Discretionary	Specialty Retail
XLE	Energy Sector ETF		
SCHH	REIT Sector ETF		
XLU	Utility Sector ETF		
PPH	Pharmaceutical Industry ETF		
VOO	S&P500 ETF		



<https://www.csueastbay.edu/student-investment-fund/>

Student Recommendations for Spring 2025

Buy Recommendations:

Fortinet, Inc. (FTNT)
 Netflix, Inc. (NFLX)
 ServiceNow, Inc. (NOW)
 IDEXX Laboratories, Inc. (IDXX)
 CME Group Inc. (CME)
 Berkshire Hathaway Inc. (BRK-B)
 Sprouts Farmers Market, Inc. (SFM)
 Paycom Software, Inc. (PAYC)
 Owens Corning (OC)

Sell Recommendations:

Texas Instruments Incorporated (TXN)
 Live Nation Entertainment, Inc. (LYV)
 Agilent Technologies, Inc. (A)
 Target Corporation (TGT)
 TriNet Group, Inc. (TNET)

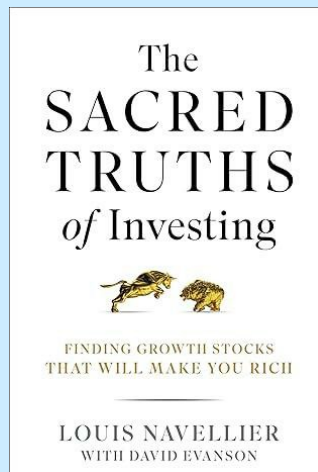
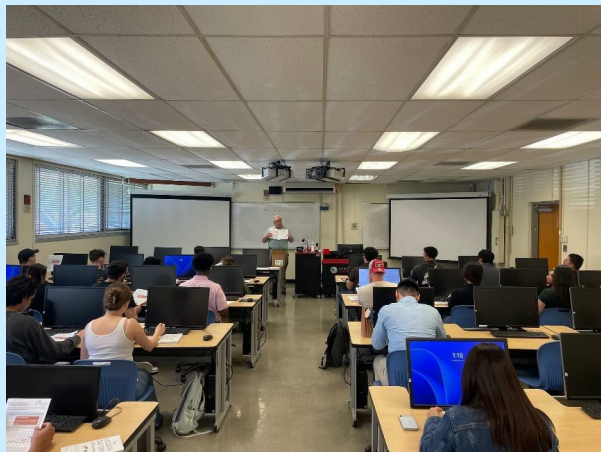
A Heartfelt Thank You to Our Guest Speakers



We extend our sincere gratitude to (from left to right) Mr. Louis Navellier (Chairman and Founder of Navellier & Associates), Mr. Luis Sanchez (Founder and Managing Partner of LVS Advisory), and Mr. Matt McClintock (CEO of M Squared Capital) who joined us for the first time this semester. Their unique perspectives provided a fresh lens through which our students could broaden their understanding of the investment landscape. Their willingness to engage with students and share real-world experiences made their sessions especially memorable.

To all our guest speakers—thank you for investing in our growth.

Louis Navellier's Incredible Generosity



We are honored to welcome back renowned growth investor **Mr. Louis Navellier** for his fourth consecutive guest appearance with the Student Investment Fund class. Mr. Navellier generously shared his market insights, personal investing philosophy, and real-world experiences that continue to inspire and educate our members.

In addition to his engaging talk, Mr. Navellier graciously provided copies of his new book, *The Sacred Truths of Investing*, ensuring that each of our students can continue learning long after the session. We are incredibly grateful for his continued support and commitment to mentoring the next generation of investors.

Inside the Fund: Hear from Current Students

Being part of the Student Investment Fund class has been one of my favorite aspects of college. I am grateful to have had the opportunity to learn from Professor Du and from prominent financial professionals like Mr. Louie Navellier, Mr. Luis Sanchez, and Mr. Matt McClintock, as they guest spoke for our class this semester. **The Student Investment Fund class helped me better my critical thinking and sharpen my analytical abilities.** It reinforced the importance of paying close attention to details because I knew that my classmates and I's decisions would have a real-world impact on an actual portfolio and the board's funds. After working with Professor Du and my classmates, gaining practical experience, and spending time in Excel, I can say that I am comfortable evaluating investments moving forward. Professor Du's enthusiasm and dedication to our success were invaluable, and I sincerely appreciate his support. After finishing the SIF class, I can comfortably say that I have been prepared for a career in finance through this experience, which has also given me a clear direction for my career journey after CSUEB.

- Sarah Abdulghafoor

Being in the Student Investment Fund has honestly been a great experience- I've learned a lot more about real world investing and been able to analyze hands-on of some of the biggest and best companies in the U.S. I'm not a finance major, so I was a little intimidated at first, but I'm glad I listened to Professor Du's recommendation that I enroll in this class. **I have no background in finance whatsoever, but you learn everything you need to during the course so I never felt like I was missing out on anything important knowledge-wise.** Because of my decision to try out this class, I have a stronger interest (and knowledge) in finance and I might actually switch to it as my major concentration! The work is mostly done in Microsoft Excel, and I can definitively say I'm way better with the program than I was before this class; and just know that Professor Du is a great professor and is open and willing to answer any questions you may have! There are also mini lectures sprinkled throughout the course about ways you can personally invest and how to be smart with your money, which I really thought was useful for my own personal finances. If you have the option to take this class, go for it- from being someone who was hesitant to take it at first, it's become my favorite and most engaging class this semester!

- Angelina Alameda

The Student Investment Fund class is a very unique one, and I feel that it has been very valuable to my growth. Without taking this class, I would probably still have a very surface-level understanding of the stock market and investing; learning about all of the details professionals look for when deciding on what company they want to invest in has been invaluable. **Being able to pitch a stock to a board of investors who are going to invest real money into the fund is such a cool and unique experience that I am very grateful to have been a part of.** Professor Brian does a great job of making his lectures engaging and always provides great feedback to give all of his students the best opportunity to do well in the class. I don't believe there are many other classes that can give you this level of real-world experience, so I would highly SIF to anyone interested.

- Justin Cromie

I have enjoyed the Student Investment Fund (SIF) taught by Professor Du. He provides very hands-on experience in investing and working with different financial models. **This class not only helps me professionally but it also helps with my own finances.** You also gain a lot of Excel experience which can be very beneficial. The professor breaks everything down to help students have the simplest and easiest understanding of how the market and trading work. I like that our research and findings can be used to make real-world investments for the school.

- Adriana Espinosa

There are not many courses available at East Bay that will give you an experience like the SIF course has. Having a hands-on experience was valuable for my education and future employment by presenting me with a process similar to real-world situations in which stock selection and management can be applied. Along with Mr.Du's wealth of knowledge and experience, as a class, we were introduced to invaluable guest speakers who were able to give us different outlooks and perspectives about the finance field and how to build a career within it, whilst talking about their experiences and work. Taking this class has strengthened my understanding of company financials and their importance to the company's stability and growth. The skills and knowledge I've acquired whilst taking the class have helped me from the moment I leave the classroom, and will stay with me until the day I retire from Finance.

- Andres Garcia-Diaz

Joining this class not only challenged my growth, but allowed me to better understand myself in ways demonstrated in this class. Having a teacher that is committed to bringing students come together, allows for us to excel in investing and building our own financial models. This class I have learned that finance is something we are always trying to improve in. **It also has granted me the ability to show up for myself and provide a better return on equity in my class, teacher, peers and for myself.** I am beyond proud to take everything I have learned in this class and pass it on to other people who are eager to listen.

- Briana Granados

I find Professor Brian Du's class to be one of the most enjoyable classes at my time here at Cal State East Bay. He does more than just teach us about investments, he sets us up how to navigate the corporate world after graduation. On our first day, he had us do presentations in class to introduce us so we can use to public speaking for our presentation with the school's investors. He was also kind enough to give us advice to be financial independent. For example, he advises us to save up and build our net worth to be \$100,000 and that's what I plan to do. The class itself is very hands on. We get to handle 100's of company's stock data and combing through them to find what will be most profitable for our investment portfolio. **I recommend everyone to take this class whenever the opportunity arises because the experience from it is invaluable.**

- Timothy Huynh

This class has been incredibly impactful and is something I hold in high regard. Learning about stocks has always been an area of interest for me, but I started with zero knowledge. I also come from a family that is financially illiterate. **Over the course of the class, I went from having no understanding to learning how to score factors, conduct quantitative and qualitative analyses, and evaluate investments.** Most importantly, this class feels real—it's knowledge I can apply in my day-to-day life. It also didn't feel like a typical class; I felt like I had true mentorship and learned how to collaborate effectively with my team. That's what makes this program unique. I'm not a finance major, and this won't count toward my degree, but the experience was definitely worth it. You will become financially literate with this strong foundational knowledge.

- Jasmine Kong

My experience in the Student Investment Fund has given me hands-on exposure to advanced investment software that I would not have encountered otherwise such as S&P Capital IQ and various excel formulas that I haven't used in previous classes. Being able to apply this to reach an end-goal has made me more motivated in this class as every assignment builds on one another to our final presentation. **I was able to apply the knowledge from my accounting courses to analyze financial metrics in real-world scenarios, helping me take a more forward-looking approach in developing investment decisions.** I've also greatly benefited from the mentorship of Dr. Brian Du, who has helped strengthen our analytical abilities and encouraged us to become more well-rounded investors. Beyond finance, we've received valuable guidance in areas like personal health and learning strategies. I believe that these skills that will benefit us far beyond the classroom.

- Hector Loza

This has been my favorite finance class I have taken so far in all of my college courses. We have learned very valuable knowledge about how to properly overlook a stock report and calculate things such as price to free cash flow to determine whether a stock is worth adding to our portfolio. I really respect the professor and how he takes the time to make sure students are comfortable to ask questions and gives very useful feedback which shows he really cares. He also prepares us for the real world with strict but fair deadlines just how we will have in the future and although I think the late work points deducted is a bit harsh I do see why it is that way. I also think after spring break we starting going at a pace that nobody was used to and was starting to get more expected out of us without really having preparation. Would have rather spent more time analyzing reports instead of doing 2-4 groups when working on the model.

- Christian Mejia

The Student Investment Fund class, taught by Professor Brian Du, provides students with the opportunity to develop strong analytical, quantitative, and qualitative skills essential for success as an analyst. While all components are important, the qualitative analysis aspect is especially valuable when evaluating a company's potential for long-term growth. **Understanding a company beyond the numbers is crucial for making informed investment decisions.** Additionally, working closely with our industry partner helps students strengthen their collaboration, time management, and critical thinking skills. I highly recommend this course to any student looking to build the tools necessary for success in the business world.

- Delano Nelson

The Student Investment Fund is more than just a class—it's a transformative experience that provides hands-on exposure to financial modeling, investment analysis, portfolio management, and stock pitching. For any student aspiring to become a financial analyst or portfolio manager, SIF is a must. Through this program, I've gained a deeper understanding of investment strategies, market dynamics, and the discipline required to thrive in the finance industry. SIF challenges you to think critically, collaborate under pressure, and operate in an environment that mirrors a real-world investment firm. Professor Du's passion for student learning is evident in every lecture. He takes off his professor cap and puts on his mentor cap—keeping it real when discussing his personal investment philosophy and instilling in us the foundational principles of financial independence. **This is a class of growth where you not only learn but genuinely feel fulfilled by the work you produce.** The time and effort culminate in a

body of work you're proud to put your name on. The SIF has been the highlight of my time at CSUEB and an experience I will carry with me for the rest of my career.

- Daniel Ochoa

Taking this course has truly brought me a valuable experience. **I appreciated how the course went beyond a textbook concept and gave us real world insight into financial markets and investing.** Being able to actively manage a portfolio and make strategic decision helped me not only developed practical skills but also gain deeper understanding of the responsibly and challengers investors face. Prof Du has been a great help and has supported me through this class. I feel confident that I will be able to take what I learned in this class and help me developed my career.

- Christopher Renteria

If you're looking for an easy A or a light course load, this class isn't for you. **But if you're ready to challenge yourself, put in real effort, and gain hands-on experience, Professor Du's Student Investment Fund is as close as you'll get to the real world of finance while still in college.** It's rigorous, practical, and packed with valuable insights. For the driven and motivated, this opportunity is a no-brainer—I highly recommend it.

- Styles Scroggins

I initially decided to join the SIF class, because I wanted to learn more about stocks/investing. SIF has been a great experience for me as I have had the opportunity to learn about all the different financial factors that go into picking a stock. **Most importantly, I'm thankful to have gained more exposure to finance through class and guest lectures.** Using Excel to analyze data and comparing/understanding the financial standing of different firms has been a great learning experience. This class has expanded my knowledge of the finance world and has better prepared me to make smarter investment decisions.

- Ramanjot Singh

The Student Investment Fund is a class I would recommend to anyone who is interested in learning about the market, stock analysis or wants to learn more about finance as a whole. This class taught me all about the important factors that are taken into consideration before investments are made as well as how to prepare an analysis report and pitching a buy or sell recommendation which are much needed skills in the finance career field. **This class is a great replacement for internships as it is much more of a work study than it is a traditional class and there is a lot to take away from it.** Professor Brian Du was a great mentor and guide through the entire semester. He taught us about financial literacy, financial independency and overall how to take care of ourselves in the long run. The student investment fund is an amazing opportunity open to all students regardless of your major. I highly encourage everyone to take this course during your academic career as there is something to gain for everybody when taking this class.

- Tyler Torres

As a non-Finance major, I came into this class eager to understand the market for my own personal growth. That perspective has given me a unique experience compared to many of my classmates who are pursuing careers in finance. This class has been very educational, we've learned how to analyze qualitative data and break down the numbers that make a company worth investing in. That alone has been valuable. **But what has stuck with me the most isn't the hours I've spent sorting through data, it's the mentorship from Professor Du.** He's shared personal financial advice that will shape how I manage both my money and my time for years to come. The real-world guidance that Professor Du has shared with us is the most valuable thing I will take away from this class, and has made all the hours of hard work worth it!

- Delaney Urban

I am extremely glad to be a part of the Student Investment Fund here at Cal State East Bay. The amount of hands-on experience I've gained in this class has been outstanding and truly transformative. **From the very beginning of the semester, we jumped straight into both quantitative and qualitative analysis, which instantly engaged us in practical, real-world financial applications.** Throughout the course, I developed and refined my skills in Excel, financial modeling, company valuation, and investment analysis. We performed deep dives into companies using tools like S&P Capital IQ and built comprehensive models to support our investment theses. This class has easily been one of the most impactful and valuable experiences of my college journey. I'm truly appreciative of this class and everything it offered, from the technical skills to the real-world perspective. I know that the knowledge, experience, and confidence I've gained will serve me greatly as I move forward in my career and continue growing in the field of finance.

- Izaak Vallin

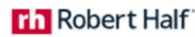
Student Success

Former SIF students have started careers in these companies:



PIPER | SANDLER





SIF Performance (as of March 1, 2025)

The total value of the SIF portfolio is \$560,430. Total contributions are \$433,520 and total investment earnings are \$126,910. Since inception, the portfolio has returned 34.14% with monthly volatility of 4.68%. For comparison, the S&P 500 has returned 36.01% with a monthly volatility of 4.71% over the same time period.

	Returns			Volatility	
<u>Year</u>	<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 YTD	-4.66%	-4.58%	-0.08%	3.50%	3.45%
Since Inception	34.14%	36.01%	-1.86%	4.68%	4.71%



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