



OAKWOOD

FUND MANAGEMENT

What is Oakwood ?

- A student run ESG investment fund - portfolio targeting a diverse range of long-term equity positions
- We have always operated as a non-profit educational platform, catering to undergraduate, graduate, and PhD students that are seeking to develop a strong foundation in market research analysis and investment comprehension
- As a team, you are expected to research your niche sector and pitch an equity you feel has growth potential

Oakwood's Story, Purpose and Values

- Established in 2020, formerly known as the East Anglia Capital and Investment society is now known as Oakwood Fund Management.
- We are committed to making a positive impact in the world through responsible investing and empowering students with knowledge.
- We facilitate opportunities for students to thrive, not only academically, but also professionally.
- We firmly believe that education is a powerful catalyst for transformation, possessing the ability to shape lives and ultimately, bring about a positive impact in our society



Our Values



Passion

At our core, we are driven by a fervent passion for achieving results that align with the success of our clients. This dedication is mirrored in our unwavering commitment to upholding the highest level of professionalism and ethical standards in all aspects of our operations. By infusing everything we do with passion, we strive to create a positive and impactful experience for all.



Integrity

Ethical conduct is paramount to us, and we expect nothing less from everyone involved with Oakwood. Transparency, accountability, and responsible decision-making form the bedrock of our approach. We firmly believe that by maintaining unwavering integrity, we not only build trust and credibility amongst ourselves but also with potential future employers.



Unity

We understand the significance of unity in fostering a successful society, and we aim to nurture this spirit within Oakwood. While our primary focus lies in providing the best investment knowledge and strategies, we equally emphasize creating a welcoming and inclusive atmosphere through social events. Our goal is to ensure that every individual feels valued and included, regardless of their level of experience with investing. Together, we form a close-knit community where collaboration and support flourish.

Vision of Oakwood

- Picture this: You've just graduated from UEA, with a couple of years at Oakwood under your belt. As you step into the corporate world and ascend its ranks, you'll inevitably meet fellow alumni. The corporate community is actually a lot smaller than you think, even more so for UEA graduates, is closer-knit than you might think.
- Fast forward 5, 10, or even 15 years. Imagine running into these very peers, those who walked the same halls as you did. Think of the pride you'll feel when you share that not only were you a part of Oakwood, but you were among the first candidates that shaped its direction. As you reflect, remember this moment as the beginning of that journey.

What you get out of this

- Personal Development: Develop/improve on your soft and hard skills that will benefit your future applications
- Network: You are constantly with bright-minded Individual's that have great aspirations
- Workshops: We will be hosting fortnightly workshops (and Speaker events) to develop your financial knowledge and personal skills
- CV: Oakwood always does play a good role in your application for companies and many interviewers ask about Oakwood
- Roles: Opportunities to progress within the fund (JA -> SA -> Director)

What we expect from the Analysts

- Joining Oakwood is a commitment! Every team should feel the sense of responsibility to come together and get the job done! Occasionally in life, you will find yourself in a high-pressured situation which will test your true characteristics. This could be the interview question asked about potential problems that might come up and you have one week to complete it (or even less in real life situations). For those that are interested in Investment Banking (IB), we can tell you that this is so incredibly normal.

Junior Analysts

- Be a team player and communicate/collaborate with each other
- Push each other to do better, push your Senior Analysts if you think there are areas you think the team itself could improve

Senior Analysts

- Be a leader and confident, be smart and collective about delegating tasks. Most importantly, unite your team together (culture and unity is too important), this could be lunch/dinners together, etc)
- Ensure your analysts are comfortable and is treated fairly

Industry Teams vs Report Teams

Industry Teams

- Mini-Industry Report
- Full Industry Report
- Stock Pitch Proposition
- Stock Pitches

Timeline

- Mini-Industry Report
 - (23rd October - 3rd November)
- Full Industry Report
 - (23rd October - 17th November)
- Stock Proposition
 - (3rd November - 17th November)
- Stock Pitches
 - (1st December)

Report Teams

- Conducting monthly reports
- Random News Reports
- Stock Pitches if you choose to do it, talk to your Senior Analysts

Timeline

- Conducting monthly reports
 - 1st December 2023
- Random News Reports
 - Usually, one week to complete

Tactical Plan (calendar)

Semester 1

Oakwood Welcome Session – Today!

Workshop 1 – Financial – 24/10/23

Workshop 2 – CV – 7/11/23

Workshops and Speaker Events will alternate
every week

Workshops every other Tuesday from 24/10

Speaker Events every other Friday from 3/11
(there is always changes)

Stock Pitch – 1st December

Oakwood's Xmas Ball – Early December (TBD)

Semester 2

Workshops and Speaker Events will continue after
the Christmas break

We will notify you via email about any changes to
events, so be sure to check your inbox!

Calendar

Stay tuned for monthly bulletins of all upcoming events for the month and keep an eye out for when the stock pitches will take place!

Communication

WhatsApp Group Chat



Discord Group Chat





Any
Questions ?