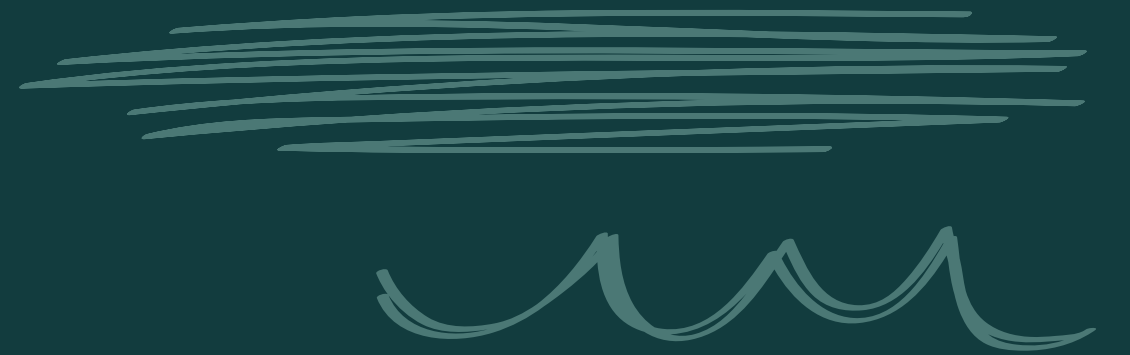




OAKWOOD

Fund Introduction



Our History & Principles

So who really are we?

Founded in 2020, Oakwood is a student-run ESG investment fund, operated by students from the University of East Anglia.

Our mission is to cultivate a deep understanding of financial markets, gain practical equity investment experience, and engage with real-world challenges in asset management, while continuously advancing our ESG investment approach and organizational culture.

Our main principles are passion, integrity and unity. We are committed to success through professionalism, integrity, and ethical conduct. We prioritise transparency, accountability, and foster a welcoming, inclusive community, while delivering top investment strategies.



Thanks for the
sales pitch but
err... who actually
are you all?

Oliver Baillie

Managing Director



I'm Oliver, a 3rd year law student. I'm the Managing Director this year and will head up our investment strategy and oversee the funds operations.

I've had an interest in finance since I was 16 and been involved since I was 18. I'm looking to go into a career in capital markets within the legal field. I've recently completed an internship at a very large global telecoms company in their commercial / M&A team.

You'll probably hear from me a lot this year, whether it be from announcements I've posted or news I've sent – I'm always doing something.

Jake Smith

Equity Director



Head of Equity Research

- **Who am I?**
 - Final year Economics
 - UEA FIS President
- Looking to break into Corporate Finance sector.

Relevant Experience

- Internships at Deloitte, Shaftesbury Capital
 - Lots of grindy stuff like GMAT, CFI

What will I do at Oakwood?

- Provide guidance / mentorship to sector heads.
 - Run training programme for Analysts
- Helping research where there may be missing gaps

Matthew Ellis

Business Development
Director



My name is Matt this year I am the Director of Business Development. Last year I was the head of Commodities where we won best team in semester 1 and best stock pitch in semester 2.

I am in my fourth year studying business finance and management with a year in industry. My placement was at a sustainability consultancy based in Norwich called Opergy Net Zero.

I am a wiser Academy Ambassador this year representing Clifford Chance, KPMG, Fidelity & Haysmacintyre

In July I undertook the Chartered institute of Securities and Investment introductory exam.

Outside of work and studies I play for UEA's 1st team in hockey.

After graduating I am looking for a career in wealth/portfolio management.

Darius Hotiu

Operations Director



I'm Darius, and I'll be the Director of Operations for this year. I started out at Oakwood as a late junior analyst last year after missing the application deadline for the first semester.

I'm a 2nd year Accounting and Finance student with a year in industry. My initial encounter with finance started in sixth form when I started trading oil & gold as means to stay more connected with markets and build commercial awareness.

In my spare time I enjoy training with UEA's Lifting Club, helping with UEAFIS, reading about hedge funds and comic books.

Our Structure

OAKWOOD



Our Teams



Each team specialises in a different area with different pillars.

- Technology Sector Team – Hardware, software (including SaaS), emerging technologies (AI and machine learning), telecommunications and marketing
- Healthcare Sector Team – Biotech, pharmaceuticals, medical devices, healthcare services.
- Financial Services Sector Team – Insurance, asset management, wealth management, investment banks.
- Consumer Sector Team – Consumer Staples, Consumer Discretionary, Retail & Cosmetics, Hospitality & Leisure, Media & entertainment
- Commodities Sector Team – Metals and Mining, Energy commodities, Agricultural Commodities, Chemical Commodities

Where our analysts end up

(we weren't kidding)

Goldman
Sachs

J.P.Morgan

citi



BNY MELLON

mazars

Baker
McKenzie.

Legal &
General

pwc

Deloitte.

AVIVA
INVESTORS

M+A
Partners

EY

Deliverables SEM1

What's your targets for SEM1?

- Mini Industry Report (Early Dec)
- Stock Pitch (Early December)
- Mini projects in conjunction with FIS (will talk about this later)

Management Deliverables

What's your targets for SEM1?

- Release a new and fresh guidebook
- Release our new website, with a variety of cool things available for you all
- Encourage collaboration & independent research projects
- Run events that benefit you (including with the Bloomberg terminals)
- Keep our transparency & be there when you need us



Training

Hybrid Model of Training:

The programme integrates online learning through platforms like WallStreetPrep and Corporate Finance Institute, allowing analysts to build a foundational understanding of finance at their own pace. Topics include financial modelling and valuations. Additionally, in-person training sessions provide interactive learning experiences, helping analysts apply theory to practice with personalised instruction and real-time feedback.

In-Person Training Sessions (Semester 1):

- Session 1: Introduction to Financial Modelling: Analysts learn to build a basic discounted cash flow (DCF) model, interpret financial statements, and integrate them into financial models.
- Session 2: Introduction to Stock Pitching: Analysts are introduced to stock screening, valuation techniques, and how to present and defend a stock pitch with quantitative and qualitative analysis.

Benefits

Importance of the Training:

This comprehensive training combines theoretical knowledge with practical application, building essential skills for investment management and corporate finance roles. The hands-on approach prepares analysts for real-world tasks, boosting their confidence and ability to make meaningful contributions.

Additional Benefits:

Analysts benefit from collaboration and networking during in-person sessions, forging relationships with peers and mentors. Ongoing support from experienced professionals ensures continuous skill development and keeps them informed of industry trends.



Other Initiatives

What does this actually mean?

- Mini projects with FIS where you, alongside a team you recruit from within FIS/Oakwood, all contribute to a piece of research
- ThinkTank? (jake?)



Q&A?

