



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 Individuals 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 – use the experience you will gain as examples in interviews and evidence.
- 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

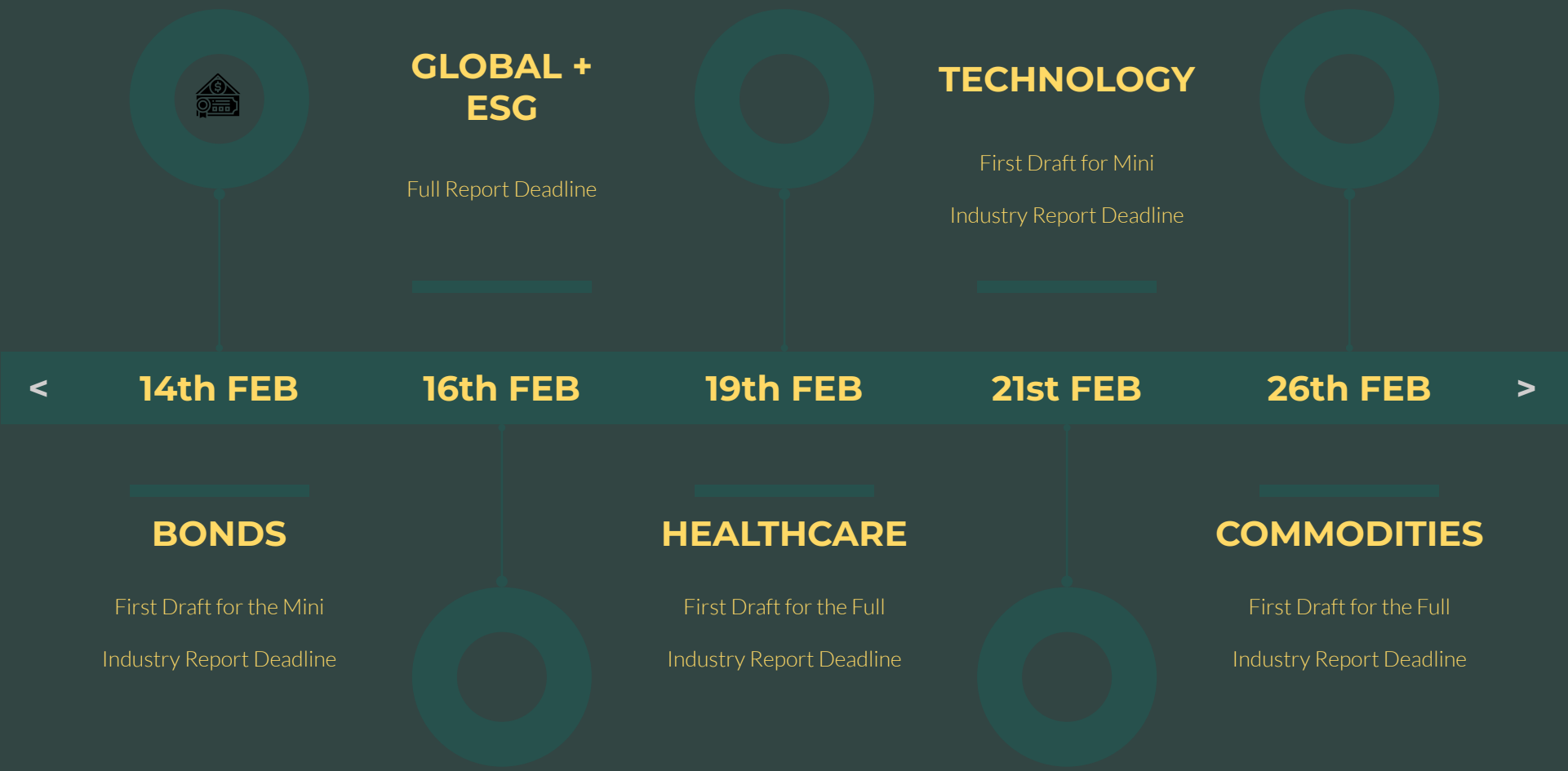
- Be a team player and communicate/collaborate with each other
- Push each other to do better, push your Senior Analysts if you think there are areas you think the team itself could improve

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

A little bit of admin stuff...

INDUSTRY REPORT TIMELINE (for more context...!)



Upcoming Key Events

1. Technical Assessment – 26th February 2024
 - This will essentially test you on some of the technical aspects that you will be using in your analysis
2. Final Stock Pitch (the real thing!) – 6th May 2024

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!

TEAMS!!!

	Technology		Healthcare		Bonds
Senior Analysts			Kieran Skinner		Amber Harrell
Junior Analysts	Sean Del Rosario		Hannah Bailey		Alex Page
	Regina Stabulniece		Suhas Ramesh		Ola Fayokun
	Oliver Wanless		Declan Cobain		Juan Lopez Libreros
			Philip Lewellen		Smart Mgbachi
	ESG Reports Breakdown		Global Research Report		Financials
Senior Analysts	Samuel Graham		Stefan-Andrei Ciobanu		Jake Smith
Junior Analysts	Aadil Jalil		Nathan Jones		Yvette Ng
	Rishabh Amin		Charlotte Lo		Emma Allum
	Jason Rai		Eva Frost-Sharratt		Ife Ogunsade
	Fedora Chukwu-Onu		Ty Gichina		Darius Hotiu
	Numar Uddin		Thomas Green		Surya Thaikkootathil
	Talha Mohamed		Charlie Wood		
	Ivan Lee				
	Commodities		Risk		
Senior Analysts	Matthew Ellis		Sam Huxford		
Junior Analysts	Daniel Searles				
	Hasini Fernando				
	Joshua Gray				
	Jenny Willacy				

Mentorship Schemes

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Joshua Li

Philip Lewellen

Juan Lopez

Eva Frost-Sharratt

Matthew Ellis

Hasini Fernando

Ollie Bailie

Surya

Thaikkoottahil

Ivan Lee

Chelsea Koomson

Sean Del Rosario

Alex Page

Smart Mgbachi

Fedora Chukwu-Onu

Jake Smith

Emma Allum

Joshua Gray

Charlie Wood

Ivan Hung

Oliver Wanless

Amber Harrell

Yvette Ng

Jason Rai

Charlotte Lo

Darius Hotiu

Daniel Searles

Thomas Green

Mentorship Schemes

Mpoki Mwaipopo

Kieran Skinner

Suhas Ramesh

Rishabh Amin

Stefan-Andrei Ciobanu

Ola Fayokun

Aadil Jalil

Numar Uddin

Jonathan Nwachukwu

Sam Huxford

Hannah Bailey

Samuel Graham

Talha Mohamed

Nathan Jones

Ife Ogunsade

Declan Cobain

Jenny Willacy

Ty Gichina

Communication

WhatsApp Group

Chat



Make sure to come to the front after the session to get invited to the Outlook and Discord!



Any
Questions ?