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For Student Investment Fund Managers, National Champions Times Two

With a 36.17 percent return during 2013, finance students at Mario J. Gabelli School of Business capture top honors at GAME, RISE competitions



Student fund managers Christopher Reilly, Robert Berlinski, Christopher Ford, Jacqueline Goncalves, Ariana Imbrescia and Trevor Sybertz with CAFE Director Michael Melton. Image Credit: Ed Strong

April 10, 2014 | Brian E. Clark

BRISTOL, R.I. – If these 21 finance students from Roger Williams University were college basketball players instead of student investment fund managers, you might call their success a Cinderella story.

With a 36.17 percent return on the investments managed during calendar year 2013 (and a risk-adjusted “alpha” of 11.86 percent), the student fund managers from the Center for Advanced Financial Education (CAFE) at the University’s Mario J. Gabelli School of Business became national champions not once, but twice, last month – March Madness, indeed!

In late March, four students representing the CAFE program placed first in the undergraduate core investment strategy category of the student-managed portfolio competition at the Quinnipiac Global Asset Management Education (GAME) IV Forum held in New York City. A week later, two students from

CAFE grabbed top honors (along with the Dragon Fund at Drexel University) in the same category at RISE 2014, the University of Dayton's 14th annual student portfolio competition.

The two events represent the pinnacle for the estimated 300 programs nationwide that allow students to make investment decisions with real money. The competitive field is hardly a pushover – the GAME Forum hosted more than 1,000 students from 131 universities in 21 countries; RISE 2014 drew a similar pool of student investment managers from across the globe.

Michael Melton, professor of finance and CAFE director, says the program's real-world setting – students execute real-time trades with access to Bloomberg terminals and professional-level security analysis technology – and its by-the-bootstraps approach set it apart from student investment efforts at other schools.

“Student fund managers at most of our competitive institutions answer to an advisory board and run their recommendations past a team of professionals,” Melton says. “At Roger Williams University, our students do absolutely everything, independently – they make the choices, they make the trades, and all the credit goes to them for these two amazing victories on the national stage.”

According to Mario J. Gabelli School of Business Dean Jerry Dauterive, the CAFE program – which launched under Melton's leadership in Fall 2004 and has sent alumni to successful finance careers for a full decade now – is a long-established example of the University's commitment to project-based, experiential learning.

“One of the hallmarks of an undergraduate education at Roger Williams is the opportunity to get involved in real-world, hands-on projects that prepare graduates to thrive professionally,” Dauterive says. “What better testament is there than our CAFE program? Dr. Melton and his student fund managers are proof that our undergrads can excel on the national stage with the best and brightest business students from across the country.”

Twenty-one students – some now alumni who graduated last May with the Class of 2013 – have been involved in managing the CAFE's national championship portfolio. Those students include:

- David Aldo, a Class of 2013 graduate from Redding, Conn.
- Robert Berlinski, a senior from Bristol, Conn.
- Laurel Bowers, a Class of 2013 graduate from Scottsdale, Ariz.
- Kyle Casserino, a Class of 2013 graduate from Southington, Conn.
- Christopher Ford, a senior from Plainville, Mass.
- Michael Forlenza, a senior from Montville, N.J.
- Jacqueline Goncalves, a senior from Trumbull, Conn.
- Ariana Imbrescia, a senior from Saugus, Mass.
- Alex Krzak, a senior from Unionville, Conn.
- Alexander Loeb, a senior from Acton, Mass.
- Huong “Grace” Nguyen, a senior from Da Nang, Vietnam

- Chris Pena, a Class of 2013 graduate from Pepperell, Mass.
- Christopher Reilly, a senior from Mont Vernon, N.H.
- Charles Spivey, a senior from Darien, Conn.
- Jason Stanley, a Class of 2013 graduate from Medway, Mass.
- Trevor Sybertz, a senior from Chestnut Hill, Mass.
- Brandon Tripodi, a senior from Darien, Conn.
- Robert Troy, a Class of 2013 graduate from Manchester, Conn.
- Daniel Walser, a Class of 2013 graduate from Southold, N.Y.
- Taylor Webster, a senior from Bristol, Conn.
- Charles Weidmuller, a Class of 2013 graduate from Mahwah, N.J.