



# ROCKY MOUNTAIN INVESTMENT CHALLENGE



## Logistics and Rules

### What is the Rocky Mountain Investment Challenge

The Rocky Mountain Investment Challenge was started 7 years ago at Colorado State University by Drs. Hilla Skiba and Frank Smith. In this Challenge, teams of undergraduate students prepare and present a stock pitch to a panel of judges chosen from the investment industry. The students can choose any publicly traded firm and conduct a thorough valuation on the company. This analysis includes investment thesis, industry analysis, financial analysis that includes relative and absolute valuation of the security and a buy/sell/hold recommendation, in line with best practices in the investment industry. Firms associated with the CFA research challenge may not be presented. The competition is open to all undergraduate college students in the country. Students participating in the Challenge will apply their classroom learning in the investment area to real world firms. The Challenge will help students gain valuable experience, build their resumes, and provide networking opportunities.

### Rules

1. Up to two teams of three to five undergraduate students from each school are eligible to participate in the Rocky Mountain Investment Challenge. Application to participate should be sent via the link provided by March 1<sup>st</sup>.
2. As soon as teams receive the notification that their entry to the competitions has been accepted, the teams may begin searching for attractive stocks and if desired, have their own internal competition to decide which two teams will represent their school at the competition.
3. At the Challenge, the teams will present their stock pitch to a panel of judges. Judges will consist of distinguished investment professionals. The judges score the presentations, deliberate, and choose the winners.
4. Teams will be judged on their presentation. Handouts are allowed but should be limited to 2 pages.
5. The first, second, and third place teams will receive cash prizes of \$10,000, \$5,000, and \$2,500 respectively. The prize money will go directly to the students of the winning teams.
6. Students are expected to comply with the honor system throughout the event.

### Presentation

1. All teams may use pre-designed templates provided by the organizers of the Rocky Mountain Investment Challenge for their presentations.
2. Teams must allow all team members to participate in the presentation and in answering the judges' questions.
3. A total of 30 minutes is allotted per team pitch; 15 minutes for the presentation and 15 minutes for Q&A from the judges. Time limits will be strictly enforced by an official timekeeper.
4. Student teams may view other team presentations once they are done with their own.
5. Judges will use an evaluation sheet for scoring. The presentation will be judged based on the quality of the analysis, presentation delivery, and the quality of the Q&A session.

### Honor System

1. For research leading up to the competition, all data sources are fair game, including the Internet and any proprietary quantitative or fundamental models developed in advance. All sources must be cited. The work, however, MUST be the student teams and may not include any outside help or professionals.
2. Teams are expected to fully respect one another's privacy; team members should neither seek nor provide information to anyone outside their own team. Teams will be allowed to avail themselves of the guidance of a faculty advisor on their pitch but will be restricted to using no more than 10 hours of such person's time. Teams may not contact investment professionals on the buy-side or sell-side (alumni or otherwise) to ask about their investment opinion on the researched stocks.
3. Violation of these rules constitutes grounds for disqualification.

### Logistics

1. Competition will be held on Friday, April 12, 2024
2. Registration Fee of \$75 will be due at registration along with team member names and emails.
3. Registration will open to teams January 30, 2024, and close March 08, 2024.
4. Check-In on the 12<sup>th</sup> will begin at 12:00 p.m.
5. The competition will begin at 1:00 p.m. and will last until 8:00 p.m. Dinner will be provided.
6. Teams are responsible for their own transportation to and from Fort Collins, Colorado for competition.

7. Team members will be provided with access to computers in the presentation rooms. The slide decks are due 30 minutes after market close on April 11, 2024.
8. Professional dress attire is required.
9. Discounted room rates have been negotiated at the *Hilton Fort Collins*. Please call 970-482-2626 and ask for the *Rocky Mountain Investment Challenge* rate with the booking code 91C. You will be able to book at the discounted rate of \$154.00 per room, per night for a standard room with one king or two double beds. The parking rate is \$15 per vehicle per day. The discounted rate, room block, and parking will be available until Sunday, March 24, 2024, or until it is sold out, whichever happens first. Or reserve online: [Rocky Mountain Investment Challenge](#).
10. There is a fee to [park on campus](#). However, if you stay at the Hilton, they are conveniently located across the street from campus, with about a 10 minute walk to Rockwell Hall West, where the competition is held.
11. Reach out to [Hilla.Skiba@colostate.edu](mailto:Hilla.Skiba@colostate.edu) or [Frank.Smith@colostate.edu](mailto:Frank.Smith@colostate.edu) for any competition questions.

### **Links to support videos**

#### [Fundamental Analysis Rocky Mountain Investment Challenge](#)

This video is meant to tell future contestants about how to prepare for our Colorado State University Rocky Mountain Investment Challenge.

<https://www.drfranksfinanceworld.com/copy-of-technical-analysis-world>