Hands-on financial analysis and portfolio management experience to prepare students for success.
Overview

The mission of Titan Capital Management (TCM) is to provide students with the opportunity to apply knowledge and skills learned in the classroom to manage investment portfolios in ‘real time.’ Student teams spend 12 months managing either a stock (equity) or bond (fixed income) portfolio funded by the CSUF Philanthropic Foundation with support from generous donations of CSUF alumni. Each portfolio is overseen by highly qualified faculty and advisory boards drawn from local investment practitioners.

The TCM Experience

The TCM program begins with three ‘boot camp’ sessions in the summer, followed by applied investment courses in the fall and spring semesters of the subsequent year.

Class sizes are small, with no more than 21 students in each section. Multiple sections are offered as needed to accommodate all qualified students in each asset class. Students receive coaching from faculty and advisory board members unavailable in a traditional classroom setting.

Each team has members who take on the roles of Portfolio Manager, Economist and Financial Analyst with all team members contributing to the analysis and recommendations associated with each role. Individual students and teams make formal presentations multiple times during the year to polish their presentation skills and strengthen their ability to communicate investment concepts accurately, concisely and persuasively.
State of the Art Resources

Students participating in TCM learn to support their investment recommendations with comprehensive industry and company competitive analysis, thorough review of financial statements, and a detailed cash flow forecast and valuation calculation. To develop a robust investment analysis, TCM students receive training on Bloomberg software, which is widely used by investment professionals for market data and security analysis.

Bloomberg provides access to the broadest array of investment data sources in the industry, including real-time prices and index values for stock and bond markets in the U.S. and around the world, financial information on publicly traded companies, and detailed information on individual stock and bond issues. Proficiency with this platform can provide students with a head start on the competition when beginning a job search after graduation.

TCM students also have access to a seminar room dedicated to team collaboration and investment research. Students can use this room to review market data, research financial information of target companies and debate ideas with colleagues. Upon completion of the TCM program, students have gained firsthand knowledge of the financial markets and are ready to begin their careers as financial analysts, traders or essential supporting team members in the highly competitive investment management industry.

Requirements

TCM builds on curriculum presented across the business administration courses offered at CSUF. To qualify for TCM, students must have a GPA of 3.0 or better and be committed to pursuing a career in asset management or financial analysis.

Candidates must be full-time graduate or undergraduate students willing and able to participate in the entire 12-month TCM program beginning with three ‘boot camp’ sessions held the summer after acceptance into the program, and continuing through the fall and spring semesters of the following academic year.

TCM candidates must complete a rigorous application process including:

• Written essay describing why you are interested in TCM and what you will bring to the program
• Faculty recommendation from CSUF or another college or university
• Development and defense of a research report for a designated company
• In-person interview with a panel of finance faculty and TCM board members
• Critical thinking and problem solving skills assessment
• Satisfactory completion of FIN 321 - Financial Analysis II and FIN 340 - Introduction to Investments (or equivalent graduate courses) prior to the fall semester of participation

Candidates with strong academic success in their finance courses and successful completion of the Student Managed Investment Fund (SMIF) course sponsored by the Chartered Financial Analyst Society of Orange County are given preference when applying to TCM.

RECOMMENDED COURSEWORK

Junior Year/Fall Semester
FIN 320, active participation in the SMIF program

Junior Year/Spring Semester
FIN 321, FIN 335, FIN 340

Senior Year/Fall Semester
FIN 442*, FIN 435, 440, or 463
FIN 443*, FIN 435, 440, or 463

*TCM Courses
If you see yourself as a strong candidate for the Titan Capital Management Program, contact us for more information.

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