As of July 1, 2023, Patty Brady ’00, CFA has been named as the managing director of the Notre Dame Institute for Global Investing after serving as interim since January.

Patty joined Mendoza in 2021 as the NDIGI director of strategic projects after working in the Notre Dame Investment Office for 17 years. She holds a BBA in finance from Notre Dame and is a CFA charterholder.

As interim managing director and in her previous role, Patty has led a number of successful initiatives to advance NDIGI’s mission to be the preeminent university-based investment management research and education program worldwide. These include the recent Women’s Investing Summit 2023, which featured more than 20 women in both senior executive and investing roles at top investment institutions, and a spring semester trek to California for 25 of our Business of Life students led by Peter Kaufman, chairman and chief executive officer of Glenair and author of the world-famous investing book Poor Charlie’s Almanack.

On Cover:
Scott Dahnke ’87 (L Catterton) and Olympian Lindsey Vonn speaking at WIS ‘23.
NDIGI Team

From Shane Corwin, William and Cassie Daley Department Chair of the Finance Department:

Patty brings extensive industry experience and a strong commitment to the University of Notre Dame to this new role. She will be an excellent leader as NDIGI seeks to enhance and expand its innovative programs and its impact on the broader investment industry.

Jim Parsons ’96, who along with his wife Dr. Carrie Quinn ’96, helped to establish NDIGI, said:

Patty has been a respected and valuable resource to the Institute since its inception. Given her work with the Notre Dame Investment office and her strong relationships with both the students and the faculty, she is well suited to lead the Institute into its next stage of growth.

Patty will continue to work with team members Mark Dumich ’06, CFA, NDIGI associate director, and Tess Swain ’18, NDIGI program manager, to build on NDIGI’s successes through new strategic priorities that enhance the experience and opportunities provided to students.

Associate Faculty Director

Jason Reed has accepted the role of associate faculty director of the Notre Dame Institute for Global Investing. Jason will oversee the student and industry-facing aspects of NDIGI, including curriculum, student programming, career discernment/training and student engagement with practitioners. He will work in collaboration with the NDIGI team of Managing Director Patty Brady ’00, CFA, Associate Director Mark Dumich ’06, CFA and Program Manager Tess Swain ’18. Jason’s experience will be extremely valuable in helping to grow the partnership between NDIGI and the College’s academic departments.

Jason, who joined Mendoza in 2015, is the Wade Family Associate Teaching Professor of Finance. He teaches in the Applied Investment Management (AIM) program in both the fall and spring semesters, as well as Security Analysis in the fall. Jason serves as the advisor for the Federal Reserve and Fiscal Challenge Club of Notre Dame and for the Cryptocurrency Club. He was awarded the 2023 Rev. Edmund P. Joyce C.S.C. Award for Excellence in Undergraduate Teaching, the 2023 James Dincolo Outstanding Teacher Award in Finance and the 2018 James Dincolo Outstanding Undergraduate Professor Award in Finance.

Faculty Director

The position of NDIGI’s Faculty Director remains open. The Faculty Director is responsible for developing and directing the Institute’s academic curriculum and student programs, coordinating faculty participation in the Institute’s programs and representing NDIGI at selected Wall Street events and industry forums.
Institute Mission and Activities

The Notre Dame Institute for Global Investing seeks to be a preeminent, university-based investment management research and education program worldwide, convening ideas and people around critical industry topics.

The Institute will:

1. **Inclusivity** – By focusing on women, underrepresented minorities and first-generation students, our research, curriculum and events are designed to encourage and promote diversity because we believe it will lead to a stronger investment management industry.

2. **Bridging theory and practice** – With an emphasis on experiential learning, NDIGI enhances the already strong finance curriculum within the Mendoza College of Business through new course development, participation of practitioners and sponsored travel. Over time, the Institute intends to provide such opportunities as concentrations, certificates and other designations.

3. **Career placement and mentorship** – NDIGI supports and develops relationships with top investment firms around the world, enhancing the opportunities for mentorship and job/internship placements. By actively focusing on placement and industry connectivity, we aim to create a sustainable leadership presence in investment organizations.

4. **Global perspective** – NDIGI focuses on expanding our global network of influential leaders and practitioners in investment management, as well as our coursework to include world markets and issues. We strive to broaden the University’s reputation within the investment industry.

5. **Enhanced research support** – NDIGI supports faculty whose research efforts will advance Notre Dame’s standing in the global investing arena. We accomplish this by directing resources to support faculty research in areas directly related to the Institute’s mission, organizing academic and practitioner conferences, providing funding for data purchases and research grants, and other research initiatives. To maximize the impact of research on practice, the Institute’s research efforts will seek to (1) promote interaction between Mendoza faculty and top industry practitioners, (2) promote collaboration with other top researchers in the field, and (3) create mechanisms to effectively communicate relevant research findings to industry participants.
**Educate and Train**

A key differentiator to the program at Notre Dame is the opportunity for students to gain practical experience within the classroom setting. Courses, guest lecturers, professional student clubs and speaker series offer programming designed to simulate on-the-job situations to prepare for careers in finance and investing. This is possible through partnership with the Mendoza College of Business Department of Finance to offer academic courses and programs that give students real-world investment experience.

**For-Credit Courses Supported by NDIGI:**
1. Applied Investment Management (AIM)
2. Applied Private Equity Projects (APEP)
3. Equity Valuation (MSF Program)
4. The Art of Investing (AOI)
5. Emerging Markets Investing (EMI)

The enrollment of NDIGI’s undergraduate courses is as follows:

<table>
<thead>
<tr>
<th>Course</th>
<th>Enrolled Students</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Applied Investment Management (AIM)</strong></td>
<td>26 undergraduates — 19 men and 7 women — enrolled in AIM LV led by faculty members Shane Corwin and Jason Reed. On September 22-25, 2022, the AIM LV class took their annual trip to New York City and met with firms including Apollo Global, Avenue Capital, D1 Capital, Daventry Group and Jennison Associates. NDIGI coordinated the annual AIM Alumni Dinner which took place on Friday, September 23, at the New York Hilton Midtown. There were over 50 AIM alumni in attendance.</td>
</tr>
<tr>
<td><strong>Applied Private Equity Projects (APEP)</strong></td>
<td>25 students — 13 undergraduate and 12 MBAs — participated in APEP LVI. The spring course was taught by professors Jason Reed and Jeffrey Bergstrand. On February 10-11, 2023, the APEP LVI class had the opportunity to travel to Chicago for firm visits with Alyeska Investment Group, Ariel Investments, Gate City Capital, Riverspan Partners, The 81 Collection and William Blair. Over 25 alumni attended the spring alumni dinner at Maggiano’s Little Italy in Chicago. Thank you to all of the alumni and firm representatives for their time and support in making these class trips so worthwhile for the AIM students!</td>
</tr>
</tbody>
</table>
Educate and Train

**Applied Private Equity Projects (APEP)** combines lectures with investment projects that emphasize practical application. APEP, taught by Mat Klody ’98, CFA, is designed to mimic the natural business interaction that occurs between senior and junior investment professionals. In fall 2022, 28 undergraduates — 15 men and 13 women — were selected to participate. NDIGI partnered with six investment firms to give the students the opportunity to work with a firm by analyzing an investment opportunity. This transformative experience for the students would not be possible without the incredible generosity of our six partner firms: Arsenal Capital Partners, Carlyle, The Jordan Company, Permira, RoundTable Healthcare Partners and Shamrock Capital Advisors. NDIGI would also like to thank the following practitioners who served as guest speakers for the course:

- **John Baumer ’90**, Senior Partner, Leonard Green & Partners
- **Blair Brenton ’09**, Principal, Shamrock Capital Advisors
- **Dave Butler ’87**, Partner, Head of Diversified Services, The Jordan Company
- **John Coyle ’88**, Partner and Head of New York, Permira
- **Sean Dedrick ’19**, Associate, Permira
- **Ed Grefenstette**, President, CEO and CIO, The Dietrich Foundation
- **Mike Kohlsdorf ’79 MBA**, President and Chief Executive Officer, Francisco Partners Consulting
- **David Koo ’93**, Senior Advisor, RoundTable Healthcare Partners
- **Mike LaSalle ’95**, Partner, Shamrock Capital Advisors
- **Andrew Lee ’16**, Vice President, Leonard Green & Partners
- **Paul Lipari ’17**, Associate, Arsenal Capital Partners
- **John Martin ’82**, Senior Partner, Victory Park Capital Advisors
- **Terry Mullen ’89**, Managing Partner and Co-Chief Investment Officer, Arsenal Capital Partners
- **Michelle Noon ’02**, Managing Partner and Co-Founder, Clearhaven Partners
- **Michael Smith ’93**, Partner and Co-Head, Credit Group, Ares Management
- **Kent Weldon ’89**, Advisory Partner, Thomas H. Lee Partners
- **Doug Zych ’93**, Partner, The Jordan Company

*John Coyle ’88 and Sean Dedrick ’19 (Permira)*

**Equity Valuation** is a Master of Science in Finance course taught by NDIGI’s Patty Brady ’00, CFA and Mark Dumich ’06, CFA. In spring 2023, 31 graduate business students enrolled in the course, which combined qualitative equity research skills with traditional quantitative valuation techniques and culminated with students analyzing publicly traded equity securities. Students were afforded the opportunity to learn from world-class investors including:

- **Drago Dimitrov ’15**, Investor, Asymmetry Ventures
- **Michael Melby ’03**, Founder and Portfolio Manager, Gate City Capital Management
The Art of Investing (AOI) is an advanced, capstone course aimed at weaving together insights from CEOs, investors and other leaders from various fields. Through guest speakers, case studies and guided readings, students further developed their understanding of human biases, organization structure, incentives and emerging themes in the investing and business world. The course was designed to facilitate a robust discussion among a diverse group of students, allowing them to learn from one another as a result of the varying backgrounds and majors enrolled in the class. In fall 2022, 40 students, including 24 men and 16 women from a combined 20 different majors, had the opportunity to engage with course material, learn from guest lecturers and dialogue with their peers on current economic and societal challenges. The Art of Investing is taught by Patty Brady '00, CFA and NDIGI Executive Fellows Rick Buhrman '01 and Paul Buser '03. NDIGI would like to extend our sincerest thanks to the following guest speakers:

- Will Barker, Founder and Portfolio Manager, Camelot Partners
- Chris Begg, Founder and Portfolio Manager, East Coast Asset Management
- Nick Cromydas, Founder and Chief Executive Officer, Hunt Club
- Rev. Bob Dowd, Vice President, Associate Provost for Interdisciplinary Initiatives, Associate Professor of Political Science, University of Notre Dame
- Luke Dennen '20, Investment Associate, Arcadea Group
- Henry Ellenbogen, Founder and Chief Investment Officer, Durable Capital
- Daniel Eisen, Co-Founder and Managing Director, Arcadea Group
- Cal Fussman, Writer at Large, Esquire
- Brad Gerstner, Founder and Chief Executive Officer, Altimeter Capital
- Tracey Graham '95, Founder and Managing Principal, Graham Allen Partners
- Peter Kaufman, Chairman and Chief Executive Officer, Glenair
- Anthony Lee, Managing Partner, Altos Ventures
- Yen Liow, Managing Partner, Aravt Global
- Gabi Marques '22, Analyst, Positive Sum
- John McGreevy, Provost, University of Notre Dame
- Jan Mohr, Chief Executive Officer, Mediqon and Founder and Managing Partner, JMX Capital
- Na'ama Moran, Co-Founder and Chief Executive Officer, Cheetah
- Bob Mylod, Founder and Managing Partner, Annox Capital
- Ho Nam, Co-Founder & Managing Partner, Altos Ventures
- Patrick O’Shaughnessy ’07, CFA, Founder and Partner, Positive Sum
- Bob Peck, Co-Founder & Portfolio Manager, FPR Partners
- Andy Raab, Co-Founder & Portfolio Manager, FPR Partners
- Mitch Rales, Co-Founder and Chair of Executive Committee, Danaher Corporation
- Will Thorndike, Co-Founder, Compounding Labs and Former Managing Partner, Housatonic Partners
- Miles Wood '20, Analyst, Compounding Labs
- Paul Yancich, Co-Founder and Managing Director, Arcadea Group
Emerging Markets Investing (EMI), offered to junior finance majors studying abroad in London, introduces students to emerging markets investing and provides them with both the conceptual framework and practical knowledge necessary to understand emerging economies. In spring 2023, EMI was taught by industry practitioners Bill Kennedy ’90, Portfolio Manager at Fidelity Management & Research Company, and Michael Workman ’95, Fund Manager at DG19 Credit Opportunity Fund. A total of 23 students, including 12 men and 11 women, enrolled in EMI in the spring and gained valuable industry knowledge while living and learning in a global financial hub.

Business of Life

This past academic year, NDIGI again hosted The Business of Life, a three-part series designed to reinforce the University of Notre Dame’s core values in the context of investing, business leadership and multidisciplinary thinking. This non-credit opportunity, open to students of any class year and major, is led by Peter Kaufman, Chairman and CEO of Glenair and author of the world-famous investing book Poor Charlie’s Almanack.

NDIGI offered The Business of Life in both fall 2022 and spring 2023. Each of the two cohorts consisted of 20-25 students who were selected through an application process. These students participated in three one-hour Zoom sessions with Peter where he led discussions across several topics with an emphasis on career discernment. Guest speakers included:

- Marco Bonvillian, Chief of Staff for John and Patrick Collison, Founders of Stripe
- Wesley Chan, General Partner, Felicis Ventures, and Founder of Google Analytics and Google Voice
- Doug Hamilton, Co-Chief Investment Officer, Schultz Capital Management
- Shankh Mitra, Chief Executive Officer, Welltower

NDIGI led three trips to Glendale, California, where students visited Glenair’s manufacturing facility to better understand the lessons of leadership, alignment and values that are key to operating a successful business. These trips, which took place on December 20, 2022, March 31, 2023 and June 19, 2023, were fully funded by NDIGI at no cost to the students.
Educate and Train

Wall Street Prep (WSP)

NDIGI is proud to sponsor a university-wide license to Wall Street Prep, an online learning platform. This partnership provides access to a variety of investing-related resources for all Notre Dame undergraduate students regardless of class year or intended major. In the past academic year, we had hundreds of students enrolled in the platform. The most popular courses were Accounting Crash Course and Financial Statement Modeling, where students spent more than 2,000 hours in online training. With a curriculum that spans from basic accounting to advanced financial modeling, and industry overviews to interview preparation, the platform helps NDIGI serve students at every level of experience and stage of discernment. There is also an opportunity for faculty to incorporate WSP modules into their curriculum so that topics such as excel training can be done independently and faculty can use precious classroom time for active learning, guest speakers or more advanced topics.

WSP’s Key Benefits to Students:

- Build financial and valuation models in Excel from scratch using simple, intuitive, step-by-step instructions that reinforce theoretical intuition while learning the model-building mechanics as performed by finance professionals
- Access over 200 hours of online training content used by investment banks, financial institutions and Fortune 500 firms
- Watch courses across all desktop and mobile devices and download videos for offline viewing anywhere anytime
- 12-month access makes Passport an essential continuing education and reference tool in other courses, throughout the recruiting process and on the job

Investing Library

NDIGI has established a robust library of investing books available for check-out to any student. The collection of books, including The Intelligent Investor by Benjamin Graham, The Little Book That Beats the Market by Joel Greenblatt and The Snowball: Warren Buffett and the Business of Life by Alice Schroeder, are housed in the NDIGI office suite in Mendoza 102. Students are welcome to stop by anytime to check out a book and chat with the NDIGI team. The library contains more than 40 titles. Suggestions for NDIGI’s Investing Library or the suggested reading list on our website are welcome.
EDUCATE & TRAIN

NDIGI Malpass Scholars Program

The NDIGI Malpass Scholars program provides an annual merit-based scholarship for students who have demonstrated a passion for investing through their academic courses, extracurricular clubs and activities, work experience and/or independent study. NDIGI Malpass Scholars must also exhibit outstanding academic achievement, demonstrate a commitment to service and major in Finance in the Mendoza College of Business. The annual scholarship award is $30,000.

The Malpass Scholars Program seeks to further our scholars’ passion for and exposure to investing through academic courses, experiential learning, networking and community building. The NDIGI Team works together with Scott Malpass ’84 ’86 MBA and our many industry partners to provide skills development, leadership training, guided readings as well as mentorship and internship opportunities.

In April 2023, NDIGI admitted six deserving students from the Class of 2025 to the program for their junior and senior years. Additionally, NDIGI awarded a four-year scholarship to one incoming first-year student.

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<tr>
<th>Class of 2024</th>
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<tr>
<td>Trinity Cha</td>
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<tr>
<td>Irvine, CA</td>
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<tr>
<td>Collaboration</td>
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<tr>
<td>Innovation</td>
</tr>
<tr>
<td>Minor</td>
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<tr>
<td></td>
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<tr>
<td>Natalie Schorr</td>
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<tr>
<td>Fishers, IN</td>
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<tr>
<td>Second Major</td>
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<tr>
<td>in Theology</td>
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<td></td>
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<tr>
<td>Mackenzie Devine</td>
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<tr>
<td>Moorestown, NJ</td>
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<td></td>
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<tr>
<td>Charlie Maxwell</td>
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<tr>
<td>Edmond, OK</td>
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<tr>
<td>Constitutional</td>
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<tr>
<td>Studies Minor</td>
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<th>Class of 2025</th>
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<tr>
<td>Campbell Babiarz</td>
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<td>Greenwich, CT</td>
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<tr>
<td>Justin Caccavo</td>
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<tr>
<td>Sandi Point, NY</td>
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<tr>
<td>Second Major</td>
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<tr>
<td>in Theology</td>
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<td></td>
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<tr>
<td>Emily Kremenski</td>
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<tr>
<td>Buffalo, NY</td>
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<tr>
<td>Second Major</td>
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<tr>
<td>in Political</td>
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<tr>
<td>Science</td>
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<tr>
<td>Conner Moore</td>
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<tr>
<td>Darien, CT</td>
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<tr>
<td>Real Estate Minor</td>
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<td></td>
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<tr>
<td>Dani Schwartz</td>
</tr>
<tr>
<td>Overland Park, KS</td>
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<tr>
<td>Constitutional</td>
</tr>
<tr>
<td>Studies &amp; Business</td>
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<tr>
<td>and Economic History</td>
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<tr>
<td>Minor</td>
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<tr>
<th>Class of 2026</th>
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<tbody>
<tr>
<td>Connor D’Aquila</td>
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<tr>
<td>York, ME</td>
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<table>
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<tr>
<th>Class of 2027</th>
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<tr>
<td>Ted Heraty</td>
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<tr>
<td>Bronxville, NY</td>
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</table>

Over fall break, NDIGI will be taking the 12 Malpass Scholars on a trip to London. They will visit several investment firms, meet with Notre Dame alumni and partake in a number of cultural experiences. We are excited to return to traveling with this group of students after a long hiatus due to Covid-19.
**Pre-College Program: The Power of Investing**

During the summer of 2022, NDIGI hosted and financially supported its first on-campus Leadership Seminar, titled ‘The Power of Investing.’ The cohort, part of the Notre Dame class of 2027, has now enrolled for the fall semester, allowing us to better measure the outcomes of our effort. As evidenced by the yield statistics below, shifting the program to an in-person format (2021 was offered virtually due to the pandemic) more effectively showcased the campus, finance curriculum and distinct Notre Dame experience to our prospective students. We are excited by the positive trend in enrollment and hope to continue to grow this pipeline of talented students into Mendoza. The program is led by the incomparable Professor Carl Ackermann, with support from the NDIGI staff.

<table>
<thead>
<tr>
<th></th>
<th>2021 (online)</th>
<th>2022</th>
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<tbody>
<tr>
<td>Participants</td>
<td>38</td>
<td>41</td>
</tr>
<tr>
<td>Applied</td>
<td>26</td>
<td>34</td>
</tr>
<tr>
<td>Accepted</td>
<td>21</td>
<td>23</td>
</tr>
<tr>
<td>Enrolled</td>
<td>9</td>
<td>12</td>
</tr>
<tr>
<td>Enrolled in Finance</td>
<td>1</td>
<td>9</td>
</tr>
</tbody>
</table>

**Career Discernment Programs**

**Pre-College Program: The Power of Investing**

**Career Treks**

NDIGI partners with the Wall Street Club to bring the career trek opportunity to underclassmen.

Career treks are an excellent opportunity for students to gain firsthand knowledge of potential job opportunities. These onsite visits can change the trajectory of students’ career discernment process. This year’s treks were back in person, following several years of virtual treks due to Covid-19. In January 2023, NDIGI traveled with groups of 20, 14 and 8 students to New York, Boston and Palo Alto respectively. Thank you to the following firms for being gracious hosts and sharing their time and expertise with our students:

**New York City:**

- Alua Capital
- Ares Management
- Arsenal Capital Partners
- Blackstone
- Evercore
- Goldman Sachs
- Jennison Associates
- Junto Capital Management
- Krainos Capital
- Sixth Street

*Jim Parsons ’96, Junto Capital Management*
Career Discernment Programs

Boston:

- BayPine
- Fidelity Investments
- M33 Growth
- MFS Investment Management
- Wellington Management
- Whale Rock Capital Management

NDIGI Advisory Appointments

NDIGI Managing Director Patty Brady ’00, CFA and Associate Director Mark Dumich ’06, CFA hosted office hours to provide students with support and career advice.

- Fall 2022 – 1:1 meetings with 57 students
- Spring 2023 – 1:1 meetings with 45 students

Visiting Executive Fellows Program

NDIGI’s Visiting Executive Fellows Program gives students the opportunity to receive guidance and advice from senior-level practitioners. The program provides students with an in-depth industry perspective as the students begin to forge their career paths in investments. During the past academic year, more than 70 students were able to meet 1:1 with the following practitioners:

- Brad Couri ’93, Managing Principal, CFI Partners
- John Garry ’14, Partner, Garry Elevator
- Doug Hamilton, Co-Chief Investment Officer, Schultz Capital Management
- Peter Kaufman, Chairman and Chief Executive Officer, Glenair
- David Koo ’93, Senior Advisor, RoundTable Healthcare Partners

Palo Alto:

- Andreessen Horowitz
- Bank of America
- Centerview Partners
- Eclipse Venture Partners
- Glynn Capital

David Glynn ’00, Glynn Capital
Convene Stakeholders

Lunch & Learns

A new program introduced this past academic year was a series of informal Lunch & Learns. Students from across campus were invited to spend an hour with visiting practitioners over their lunch break. This pilot program was very well received, as our 12 events attracted over 400 participants. This was a meaningful way to scale some of the success we have seen through one-on-one meetings with Executive Fellows. The format also provided meaningful discernment opportunities to younger students who may have been too intimidated to schedule individual sessions. We are grateful for the industry professionals that helped make this series a success:

- Mike Anello ’09, Co-Founder and Managing Director, M33 Growth
- Chris Bloomstran, President and Chief Investment Officer, Sempur Augustus Investments Group
- Brad Couri ’85, Managing Principal, CFI Partners
- Drago Dimitrov ’15, Investor, Assymetry Ventures
- John Garry ’14, Partner, Garry Elevator
- Doug Hamilton, Co-Chief Investment Officer, Schultz Capital Management
- Jerome Heppelmann ’93, Business Fellow, Villanova University
- Dave Hilal ’93, ’94 MBA, Chief Financial Officer, Georgetown Visitation Preparatory School
- Malcolm Johnson ’98, Chief Executive Officer, Langdon Park Capital
- Peter Kaufman, Chairman and Chief Executive Officer, Glenair
- David Koo ’93, Senior Advisor, RoundTable Healthcare Partners
- Joe Ros, Partner, Entrepreneur First

NDVC Reunion

In April 2023, NDIGI sponsored the inaugural Notre Dame venture capital alumni reunion. In partnership with the NDVC club, NDIGI hosted this networking reception on the rooftop of the Embassy Suites. This event, which included keynote speakers, a startup pitch and a presentation from the NDVC club leadership, gave alumni and current students the opportunity to meet, connect and strengthen the Notre Dame venture capital network. In attendance were more than 20 alumni working in venture/growth, as well as 20 of NDVC’s top students. The event is representative of one of the many ways we are working to ensure our students have broad exposure across asset classes and job opportunities within investing.

Inaugural NDVC Alumni Reunion
WIS '23: Defining your Edge

WIS '23 marked the fifth anniversary of the Women's Investing Summit (WIS), an important inclusion initiative at NDIGI. WIS is a forum for female-led discussion on leadership, markets and investing. This year, 425 students from six colleges across campus registered for the two-day event.

WIS '23 kicked off in the Jordan Auditorium with a panel on early-stage investing in partnership with the Notre Dame Venture Capital Club.

Members of the panel included:

- **Elizabeth Davis ’12**, Principal, Anthemis
- **Sharlene Guiriba ’14**, Associate, Lerer Hippeau
- **Yasmin Moaven**, Chief Marketing Officer/Investor Relations, Pipe
- **Adrianna Samaniego**, Principal, Female Founders Fund
- **Ally Schneider ’13**, Head of Partnerships, Vouch

Immediately following the early-stage investing panel, NDIGI, in partnership with the Hesburgh Women of Impact, hosted a dinner for students, speakers and sponsors. **Haley Scott DeMaria ’95** provided the keynote and shared lessons on overcoming adversity and living a life of gratitude.

On Friday morning, 20 senior women from various leadership roles and asset classes traveled from all over the country to share career wisdom, market insights and investment ideas. Keynote speakers included Olympic gold medalist **Lindsey Vonn**, former Neiman Marcus Chief Executive Officer **Karen Katz** and president and Chief Investment Officer of Brandywine **Jenny Heller**.
Convene Stakeholders

Students were also afforded the opportunity to learn from Goldman Sachs Managing Director Nora Creedon, L Catterton Co-Chief Executive Officer Scott Dahnke ’87, Strategic Investment Group President and Chief Client Officer Nikki Kraus ’94, CFA and Chief Executive Officer/Board Director Sally Pofcher, as well as the following panels:

Private Equity Panel:

- Kelly Cornelis ’96, Partner & Chief Operating Officer, LaSalle Capital
- Laura Held, Partner, Shamrock Capital
- Beth Lesniak, Managing Director, Norwest Equity Partners
- Jessica Mattes ’06, Vice President and Private Wealth Advisor, Goldman Sachs

Public Equity Panel:

- Kristy Akullian, CFA, Director, BlackRock
- Mary Flaherty, Managing Director, Jennison Associates
- Kimberly Flynn ’99, CFA, Managing Director, XA Investments
- Gretchen Guo, CFA, Co-Founder & Partner, FACT Capital
- Sharon Zackha, CFA, Group Head-Consumer, William Blair

All of the speakers had a demonstrated edge in their field and each articulated how they have built and maintained that edge over their careers.

WIS ’23 was made possible through industry sponsors including Goldman Sachs, Sixth Street, William Blair, Artisan Partners, BlackRock, Jennison Associates, Norwest Equity Partners and TCW.

Gold: Goldman Sachs | Asset Management  
Blue: ARTISAN PARTNERS  
BlackRock  
JENNISON ASSOCIATES  
Norwest Equity Partners  
TCW

Please save the date for WIS ’24, to be held on campus February 29-March 1, 2024.
Convene Stakeholders

WIS ’23 Stock Pitch Competition

On February 23, 2023, NDIGI and the Notre Dame Investment Club hosted the fourth annual Student Stock Pitch Competition Finals. The annual stock pitch competition aligns with NDIGI’s mission to educate and train students through applied learning experiences. The competition is open to all students, connects participants with industry professionals and blends qualitative business analysis with the principles of valuation.

There were 34 initial entries to the competition. NDIGI then paired five semifinalists with industry mentors to prepare them to pitch to a panel of ND faculty and staff. Thank you to Jacob Benedict ’07, CFA and Danny Kilrea ’22 from the Notre Dame Investment Office for serving as judges of the semifinals.

Ultimately, three teams were selected to present at WIS to a panel of practitioners. Thank you to our judges Kimberly Flynn ’99, CFA (XA Investments), Mat Klody ’98, CFA (Rockefeller Capital Management) and Jenni Lanktree ’02 (Junto Capital Management) for their time and thoughtful input.

The results of the competition are as follows:

1st place: Enhabit Home & Health (NYSE: EHAB) - John Davey ’25 and John O’Neill ’25 (awarded $1,000)
2nd place: AutoZone Inc. (NYSE: AZO) - Ryan DuFour ’25 and Conner Moore ’25 (awarded $500)
3rd place: Mastercard Inc. (NYSE: MA) - Grace Kamholz ’23 and Mia Matsunami ’23 (awarded $300)

A special thank you to the Investment Club leadership Stewart Buzdon ’23 and Finn Gannon ’23 and Investment Club Faculty Advisor John Stiver for all of their help in coordinating this year’s competition.
Convene Stakeholders

Robert K. Wilmouth Speaker Series

The Robert K. Wilmouth Speaker Series honors Robert Wilmouth, a longtime trustee of Notre Dame and past chair of the Investment Committee. The series continued this year, with a goal of helping students gain valuable knowledge about investing while simultaneously providing them with information they can use to discern a desired career path. These signature events attracted more than 400 students across all colleges and class years.

**Fall Semester**

- **Tom Sosnoff**, Chief Executive Officer, tastytrade *(in partnership with the Crypto Club)*

**Spring Semester**

- **Brian D’Arcy ’08**, Partner, Sixth Street *(in partnership with BlackND Capital and the Department of Africana Studies)*
- **Grant Ebenger ’17**, Investor, Tiger Global
- **Cal Fussman**, Writer at Large, Esquire

NDIGI Advisory Board

As our primary link to the investment community, the NDIGI advisory board is a critical governing body of the Institute. From strategic planning to providing assistance to achieve our identified priorities, the advisory board has been a tremendous support to NDIGI. One meeting was held this academic year on October 15, 2022, in South Bend. Board members include:

- **Kevin Compton**, Founder, Radar Partners
- **Jay Jordan ’69**, Chairman and Chief Executive Officer, Jordan Industries
- **Katie Koch ’02**, President and Chief Executive Officer, TCW
- **Scott Malpass ’84, ’86 MBA**, Former CIO, University of Notre Dame, and Founder and Managing Partner, Grafton Street Partners
- **Molly McDonnell ’99**, Managing Director and Chief Financial Officer, Lone Pine Capital
- **Jim Parsons ’96**, Chief Executive Officer and Chief Investment Officer, Junto Capital Management
- **Ted Weschler**, Investment Manager, Berkshire Hathaway

On Back Cover:

*Aray Beisenbayeva ’26 delivering the Invocation at the WIS ’23 Dinner*