



## MISSION

The mission of the UWIN program is to inspire, develop and recruit undergraduate women for investment management careers through mentorship and internship opportunities.

## PROGRAM DESCRIPTION

The Loomis Sayles Undergraduate Women's Investment Network (UWIN) program offers both mentorship and internship opportunities for undergraduate women in their sophomore and junior years at Boston area colleges and universities who have an interest in business, finance, accounting, mathematics, economics or investments.

## MENTORSHIP

The UWIN mentorship program matches selected undergraduate women with a Loomis Sayles mentor to help connect the educational experience to a potential career in investment management by sharing knowledge, experience and career advice. The mentorship program requires a school year commitment of 1-2 hours per month to connect with the mentor, in addition to participation in professional development, networking and educational workshops, including:

- Introduction to Investment Management
- Effective Communication Skills
- Marketing Yourself: Cover letters, resumes and interviews
- Bloomberg and Advanced Excel
- Day in the Life of a Trader
- Personal Finance 101
- Deep dive sessions on investment research: macro, credit, equity, securitized, quantitative

## INTERNSHIP

The UWIN internship program is rotational during the school year. Undergraduate women experience two investment or client facing functions (one per semester) in areas such as fixed income research, portfolio management, equity research, product marketing and client relationship management. The internship program requires a school year commitment of between 10-16 hours per week over two 10-week rotations. Each intern will also be matched with a Loomis Sayles mentor as part of the mentorship program described above. Sample projects include:

- Performing fundamental industry, market, company and valuation analysis
- Building and updating financial statement models and comparable company spreadsheets
- Summarizing valuation metrics across industries and holdings of investment teams
- Generating portfolio optimization recommendations based on in-house fundamental analysts' and macro team forecasts
- Performing peer performance analysis
- Monitoring changes to exchange rate, global bond yields, inflation and growth forecasts