Tozzi Trading Floor Workshops, Fall 2012
E1410 – by Kai Petainen – kpetaine@umich.edu

There is no sign-up sheet. Just show up. Open to those taking at least one class at Ross. You will share a PC. All the PCs have FactSet, 7 PCs have Bloomberg.

Intro to FactSet – if you take only one workshop in Tozzi, take this
For equity, quant-work, and hedge funds, FactSet is THE premier equity research tool. This workshop covers equity research, charts, equity comparison, financial statements, estimates, news, research reports, mutual fund/insider ownership, and M&A deals. This might help with homework!

Friday, Sept. 7th  10:00 am – 12:00 pm
Friday, Sept. 7th  1:00 – 3:00 pm
Friday, Sept. 14th  10:00 am – 12:00 pm
Tuesday, Sept. 11th  7:00 – 9:00 pm
Wednesday, Sept. 12th  7:00 – 9:00 pm
Friday, Oct. 19th  1:00 – 3:00 pm
Friday, Nov. 16th  9:00 – 11:00 am

Advanced FactSet - Equity Quant Screening
You do not need previous experience with screening. We'll create a simple screen and then I'll show you how to create a complex screen and back-test formulas from that screen. This workshop can help you choose a stock and learn how some quant/hedge funds operate.

Friday, Sept. 14th  1:00 pm – 3:00 pm
Tuesday, Sept. 18th  7:00 – 9:00 pm
Wednesday, Sept. 19th  7:00 – 9:00 pm
Friday, Sept. 21st  10:00 am – 12:00 pm
Friday, Sept. 21st  1:00 – 3:00 pm
Friday, Nov. 16th  11:30 – 1:30 pm

Let’s ‘value’ a few stocks - Equity Valuation
The equity valuation workshop will cover the software tools in Tozzi and how you can use them to value stocks. I won't talk about theory, NPV, CAPM, or beta - your classes are meant for that stuff. This is a practical workshop. If you're going to pitch a stock somewhere, this session will certainly help you. Equity valuation is part art and part science, and hopefully this will help a bit more.

Tuesday, Sep. 25th  7:00 – 9:00 pm
Wednesday, Oct. 3rd  7:00 – 9:00 pm
Friday, Oct. 5th  10:00 am – 12:00 pm
Friday, Oct. 5th  1:00 – 3:00 pm
Friday, Oct. 12th  10:00 am – 12:00 pm
Friday, Nov. 16th  2:00 – 4:00 pm

Bloomberg Introduction
Would you like to get Bloomberg certification? This workshop can help towards getting your certification. I’ll cover some of the basic Bloomberg functions.

Tuesday, Oct. 2nd  7:00 – 9:00 pm
Wednesday, Oct. 10th  7:00 – 9:00 pm
Friday, Oct. 12th  1:00 – 3:00 pm
Friday, Nov. 2nd  10:00 am – 12:00 pm
Friday, Nov. 2nd  1:00 – 3:00 pm
Friday, Nov. 16th  4:30 – 6:00 pm