

[CBFS Executive Advisory Board](#)

### Platinum Level Member



### Gold Level Members



### Silver Level Member



### Bronze Level Members



## Congratulations to Our Students for Winning the 2025 Regional CFA Institute's Investment Research Challenge

I am super excited to share with you that our students (from left to right) Christopher Soto - CFO of the Forest Systems Student Managed Investment Fund, VP of the Banking and Investment Association (BIA), Board Member of the Silicon Valley Aggressive Growth Fund and Board Member of the SJSU Spartan Student Managed Real Estate Fund, Shruthi Nagapuri - VP of BIA, Sarah Saiyed and Ocean Arya - CEO of the Forest Systems Student Managed Investment Fund, President of BIA, Board Member of the Silicon Valley Aggressive Growth Fund and Board Member of the SJSU Spartan Student Managed Real Estate Fund, won the 2025 CFA Institute's Investment Research Challenge for the regions of Northern California and Northern Nevada (competition administered by the CFA Society of San Francisco).

### 2025 AvidBank Game



The objective of the competition is to expose students to the practice of commercial banking. Students answer questions, network, and interview with AvidBank managers and executives.

### 2025 Star One Credit Union Mortgage Banking Certificate



The certificate is a (non-credit) program that exposes participants to residential real estate mortgage analysis, underwriting and approval.



**Bridge Bank Tour  
03/12/2025**

### Spring 2025 CBFS Equity Competition

Pictured on the left (from left to right) – Ocean Arya (BIA President), Dylan Lofaro (Judge), Nick Nyssen (Edward Jones, Winning Team Mentor), Helen Grays-Jones (MeriWest CU, Judge), Peter Wu, Ryan Pickett, Dr. Stoyu I. Ivanov (Director CBFS) and William Thompson. Winners holding trophy – “the sledge-hammer that forges skills and molds careers.”

### TechCU CBFS SJSU Alumni Association Networking with Executives Event

### Student Managed Fund Pitch Schedule

09/04/2025	<b>Pitch 173</b>
09/09/2025	<b>Pitch 174</b>
09/16/2025	<b>Pitch 175</b>
09/18/2025	<b>Pitch 176</b>
11/04/2025	<b>Pitch 177</b>
11/06/2025	<b>Pitch 178</b>
12/02/2025	<b>Pitch 179</b>
12/04/2025	<b>Pitch 180</b>

### MeriWest CU Tour 04/25/2025



**Student Managed Investment Funds**



**2025 CBFS Scholarship Ceremony**

	Start Value	03/31/2025 End Value	Return
<b>Forest Systems SMIF (Inception Date 3/13/14)</b>	\$50,100.26	\$122,563.15	145%
<b>SV Aggressive Growth Fund (Inception Date 3/31/17)</b>	\$30,100.26	\$53,100.70	76%
<b>Spartan SM Real Estate Fund (Inception Date 06/22/23)</b>	\$75,000.00	\$80,441.78	7%
<b>Combined Portfolio</b>	\$155,200.52	\$256,105.63	65%
<b>S&amp;P 500 Index</b>	1,869.06	5,611.85	200%



### 2025 SJSU Economic Summit

**Wednesday, June 18, 2023 8:00am-11am,**

Morris Dailey Auditorium, SJSU

Confirmed Panelists:

**Sam Liccardo**, Congressman, 16<sup>th</sup> District of California

**Dr. Christopher Thornberg**, Beacon Economics

**REGISTER NOW:** [www.sjsu.edu/economicsummit](http://www.sjsu.edu/economicsummit)

The Newsletter was prepared at San Jose State University by: Dr. Stoyu Ivanov, Professor, Gloria and Michael Chiang Investment Fellow, and Director of the Center for Banking and Financial Services.

### SJSU Center for Banking and Financial Services (CBFS)

Founded in 2008, the purpose of the Center for Banking and Financial Services (CBFS) is to establish valuable partnerships between San José State University's Lucas College and Graduate School of Business and local financial institutions. The focus of the Center's efforts is to create links between talented SJSU students and the banking and financial services industry in order to enhance student knowledge through curricular and extra-curricular activities. This is especially important because there may be a discrepancy between the career opportunities in the financial sector and students' understanding of those opportunities. As a result, the partnerships built by the center benefit SJSU, its students and the companies represented on the CBFS Executive Advisory Board.