

2023 Smeal REIT Stock Pitch Competition

Sponsored by the Borrelli Institute for Real Estate Studies

The 2023 Smeal REIT (Real Estate Investment Trust) Stock Pitch Competition is an opportunity for undergraduate students to showcase their ideas and understanding of real estate in a 3-minute stock pitch format.

No Experience is Necessary!

Register for the competition by **Sunday, January 22, 2023, at 11:59 PM**

- ❖ To register for the competition, participants must fill out and submit the Qualtrics form found at this link: https://smeal.qualtrics.com/jfe/form/SV_Oprd3BdXNjkYLjw
- ❖ The registration form will ask for the following: your name, PSU e-mail address, phone number, class standing (i.e., 1st, 2nd, 3rd semester), major including minors and certificates, acknowledgment that you have read, understand, and agree to the rules and required participation commitment expected as a participant of the 2023 Smeal REIT Stock Pitch Competition.
- ❖ This registration will allow you to receive access to the competition Canvas page where there are additional resources and materials that are to be submitted for the competition.
- ❖ E-mail Nicole Peggs at npeggs@psu.edu if you have any questions

First Round:

Tuesday, January 24, 2023

Materials and video clip must be uploaded to the REIT Stock Pitch 2023 canvas page by **11:59 PM on Tuesday, January 24, 2023**. Only participants with complete submissions will be considered.

- ❖ Participants must prepare a written research report outlining their investment idea. The maximum length for the report is three pages.
- ❖ Participants will have the option to create a PowerPoint presentation outlining their investment idea. (optional)
- ❖ Participants will need to record a video of themselves presenting their stock pitch. The video should be one to three minutes in length. A video recorded on a cell phone or similar device is acceptable.
- ❖ The report, video and optional Power Point presentation must be uploaded to the site no later than **11:59 PM on Tuesday, January 24, 2023**.
- ❖ Participants will be judged based on the pitch idea and video presentation.
- ❖ Competition judges (Real Estate faculty and/or Wall Street professionals) will select up to 10 students to participate in the semi-final round.
- ❖ All first-round participants will receive notification by Thursday, January 26th regarding their status.

Semi-Final Round:

Materials Due- Tuesday, January 31, 2023

Presentations- Wednesday, February 1, 2023

Semi-final round participants have the option to revise their mandatory written report and optional PowerPoint presentation. The written report and optional PowerPoint presentation must be uploaded to the site by **11:59 PM on Tuesday, January 31, 2023**. Only those participants with complete documents will be permitted to participate in the semi-final round. **The semi-final round in person presentations will be held on Wednesday, February 1, 2023.**

- ❖ Participants must prepare a written research report outlining their investment idea, no more than a maximum of three pages in length. Participants have the option to create a PowerPoint presentation outlining their investment idea. (optional and not required) Only PowerPoint presentations that have been uploaded to the site by **11:59 PM on January 31, 2023**, can be used or referenced during the semi-final round. The use of a PowerPoint presentation that was not uploaded by the deadline will result in disqualification of the participant. Participants have the option to include handout or reference materials for the judges that may not exceed three pages in length. The handout/reference materials can include items such as a brochure, map, diagram, photo, spreadsheet, etc. Only handouts or reference materials that are uploaded to the site by **11:59 PM on January 31, 2023**, can be used or referenced during the round.
- ❖ Participants will each be assigned a presentation time and should arrive a minimum of five minutes before their assigned time.
- ❖ Each student will have three minutes to present their REIT investment idea. The presentation will be timed, and the student will be stopped at three minutes. Judges will have up to ten minutes to ask questions at the conclusion of each presentation. At the conclusion of the Q&A period the participant will exit the room.

- ❖ Top four presentations will earn the students the opportunity to present to a panel of industry experts in the final round and to compete for scholarship money.

Final Round:

Materials Due- Monday, February 6, 2023

Presentations- Thursday, February 9, 2023

- ❖ Judges will be industry professionals and may include Wall Street and real estate experts, fund managers and senior analysts.
- ❖ Each student will have three minutes to present their REIT investment idea. The presentation will be timed, and the student will be stopped at three minutes. Judges will have up to ten minutes to ask questions at the conclusion of each presentation. At the conclusion of the Q&A period the participant will exit the room.
- ❖ Judges will be provided a scorecard for each student and will judge the students based on three criteria: pitch idea, presentation, and question handling.
- ❖ At the end of the competition, all the finalists will be notified of the results by e-mail. The judges will provide feedback to each participant on the strengths and weakness of their pitch.
- ❖ The scholarship money will be distributed as follows: \$2,000 for 1st place, \$1,000 for 2nd place, \$500 for 3rd place, and \$250 for 4th place. The winners will be provided with additional instructions to facilitate the process of distributing the scholarship prize money into their Penn State Student Account.
- ❖ All decisions by the judges are final!