



Investment Banking 101

BFS Fall 2025 | November 10, 2025



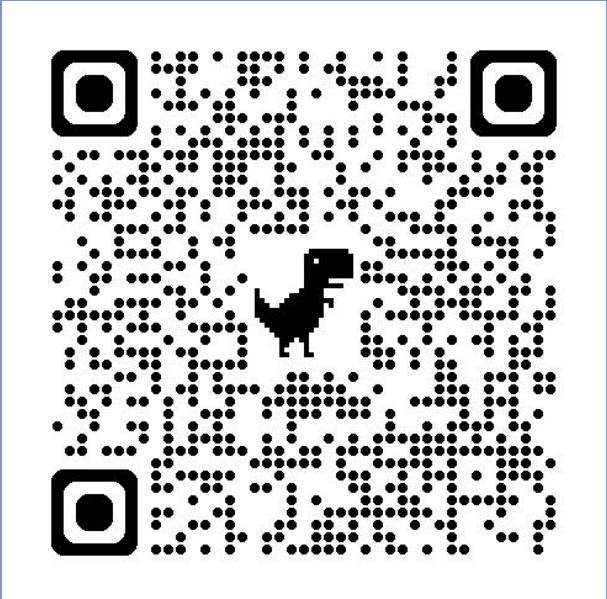
IB 102

RSVP Form !!

When: Thursday, Nov. 13,
6:30pm - 7:30pm

Where: On Zoom

RSVP Now!



Almitas Capital Info Session



When: Nov. 12, 5-6pm

Where: Young Hall 2033

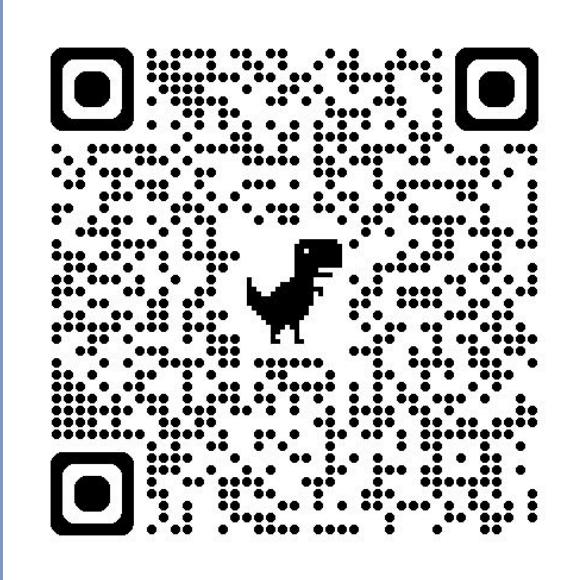
Why: meet investors from distinctive
multistrategy hedge funds



RSVP: tinyurl.com/Almitas-Info



Sign in sheet ->
Keep an eye out for
the password!



BFS Journal

Interest form →

- Accessible, open for all
- Tangible writing experience
- Learn about the finance world through research



What does IB do?

01

Capital Raising

02

Advisory Services

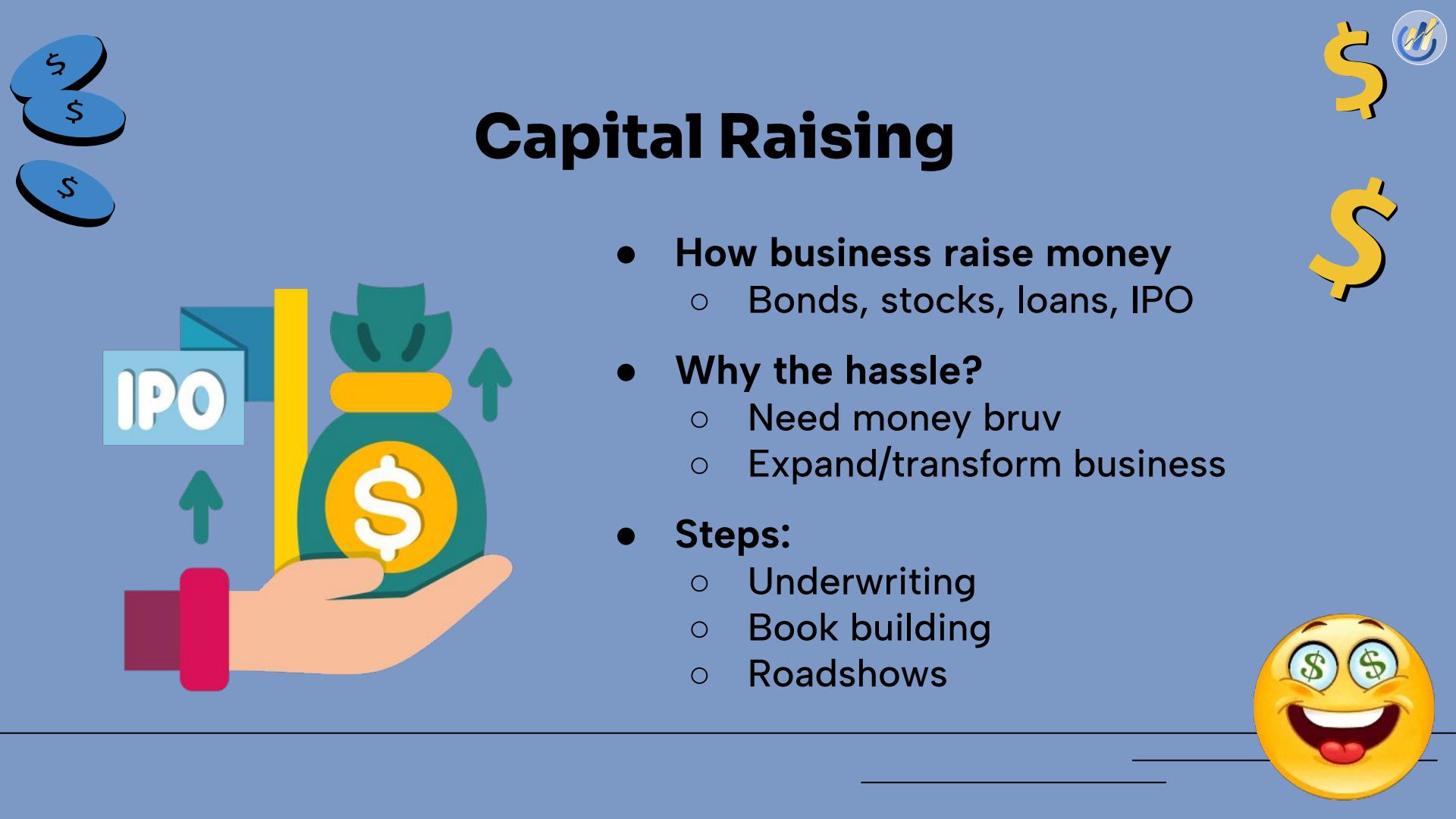
03

Trading &
Market Making

04

Research & Analysis



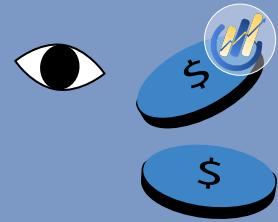


Capital Raising

- **How business raise money**
 - Bonds, stocks, loans, IPO
- **Why the hassle?**
 - Need money bruv
 - Expand/transform business
- **Steps:**
 - Underwriting
 - Book building
 - Roadshows



Advisory Service



Mergers &
Acquisitions (M&A)



Restructure & Risk
Management

M&A



Advise Clients on M&A

- Valuation
- Deal Structuring
- Due Diligence
- Deal Closing
- Post-Merger Integration (PMI)





Trade & Market Making



Client Trading

Bank = "stockbroker"

Market Making

Quoting buy and sell prices

Proprietary Trading

Use own money → direct profit





Research and Analysis

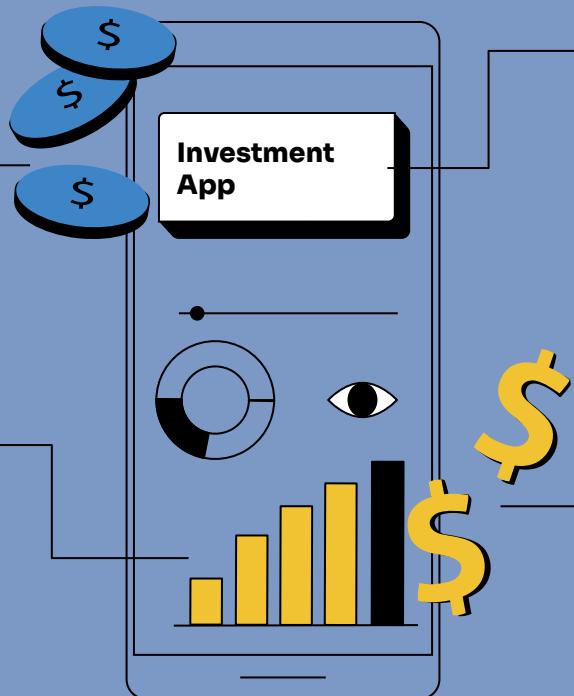


- Market Research
 - Companies, industries, trends
- Bachelors required
 - Useful credentials: MBA, CFA
- 70 – 100 hours/week
- 2 – 3 years till Associate



Types of Firms

Middle Market
Handle mid sized deals: (Jefferies, RBC, Baird)



Bulge bracket banks
Global Banks like:
(Goldman Sachs, JP Morgan, BofA, etc)

Boutique
Very specialized in one field of finance:
(Evercore, Lazard, etc)



Recruitment Cycle





Recruitment Starts Early!



Freshman

- Networking begins
- Diversity Programs



Sophomores

- Applications open
- First-round interviews
- Superday interviews



Juniors

- 10-week summer internship
- Return offers



Pros vs Cons of the industry

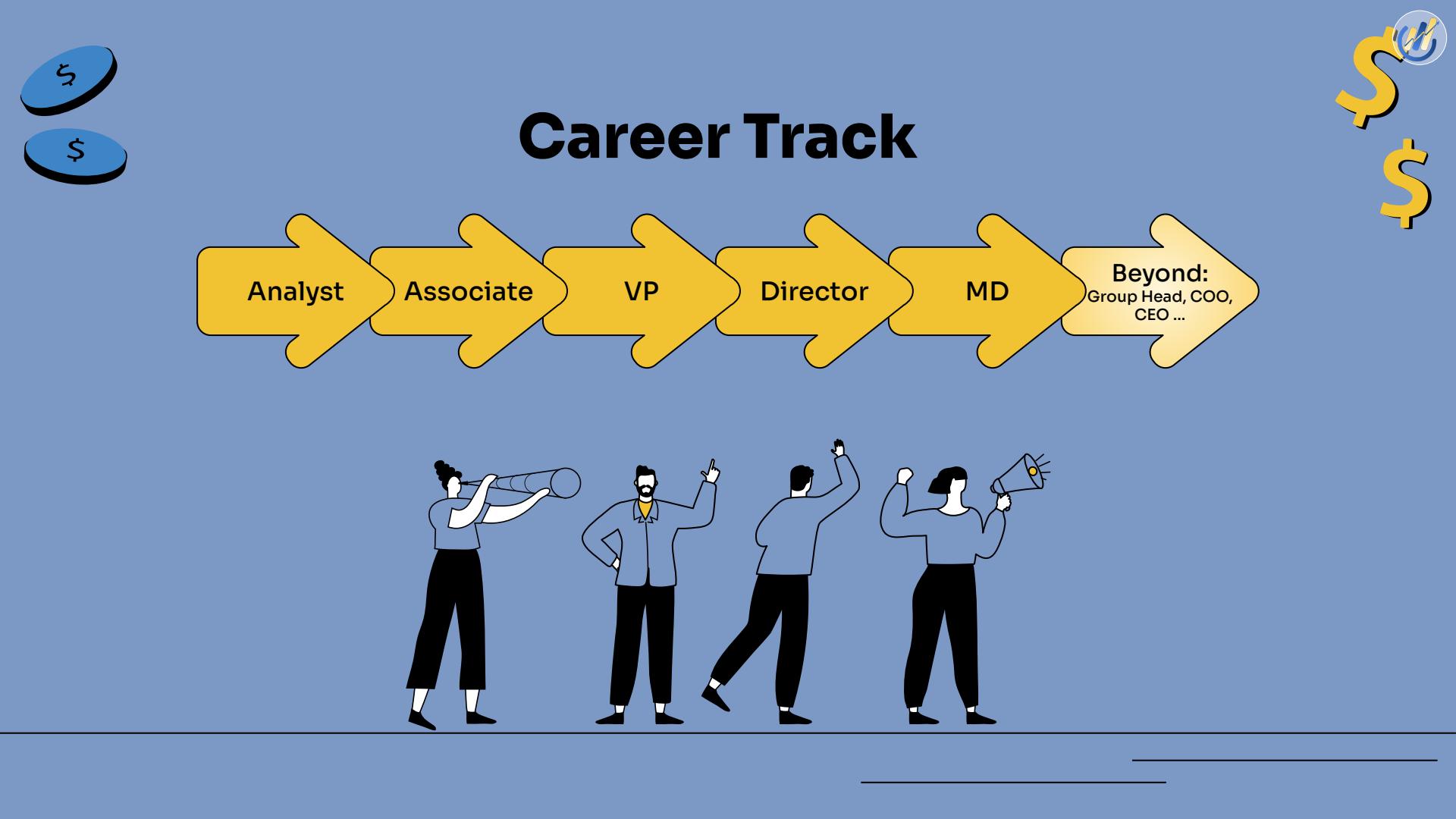


- \$\$\$
- Intellectually stimulating
- Prestige
- Learning
- Direct impact
- Exit / futures



- Work/Life balance
- Pressure/stress
- Burnout
- Repetition
- Competition
- Transactional





Career Track

Analyst

Associate

VP

Director

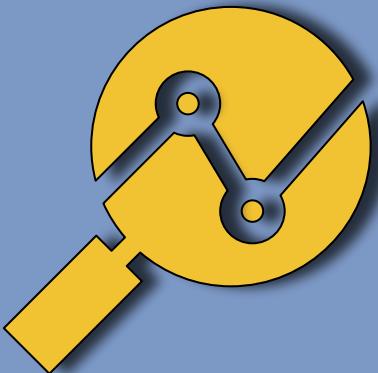
MD

Beyond:
Group Head, COO,
CEO ...





Buy and Sell Side



Buy Side



Sell Side



\$
\$



Buy Side

- Help others buy and sell investments
- Advise companies on how to raise money
- Their main goal is to **earn fees or commissions**

Private
Equity

Venture
Capital

Hedge
Funds

Mutual
Funds

Growth
Equity

Pension
Funds

BlackRock

KKR
APOLLO

Accel

SEQUOIA

BRIDgewater

CITADEL

DE Shaw & Co

Vanguard

Fidelity
INVESTMENTS

**GENERAL
ATLANTIC**

**SUMMIT
PARTNERS**

CalPERS
CPP Investments

\$



\$



Sell-Side

- Firms and investors that **use money to buy investments**
- Their goal is to **make a profit over time**
- **Analyze markets and businesses** carefully

Investment
Banking

Goldman
Sachs



BANK OF AMERICA

Morgan
Stanley

Brokerages



Robinhood

Equity
Research

EVERCORE ISI



Banking
(Corporate,
Commercial)



Sales



Trading

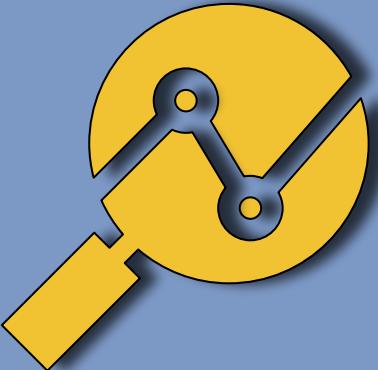


JPMORGAN
CHASE & CO.





Summary



Buy Side



Sell Side



\$
\$



Resources



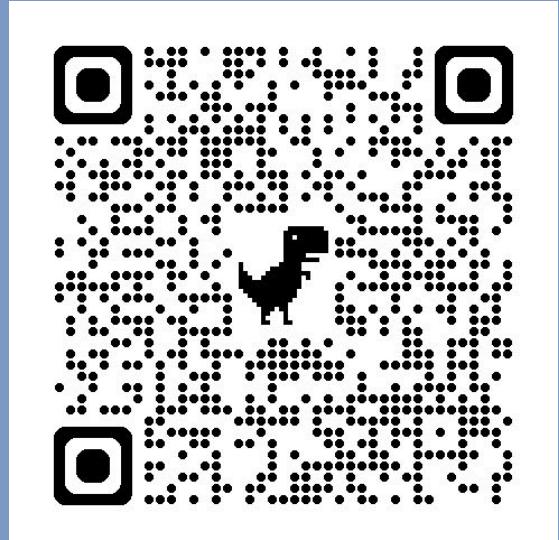
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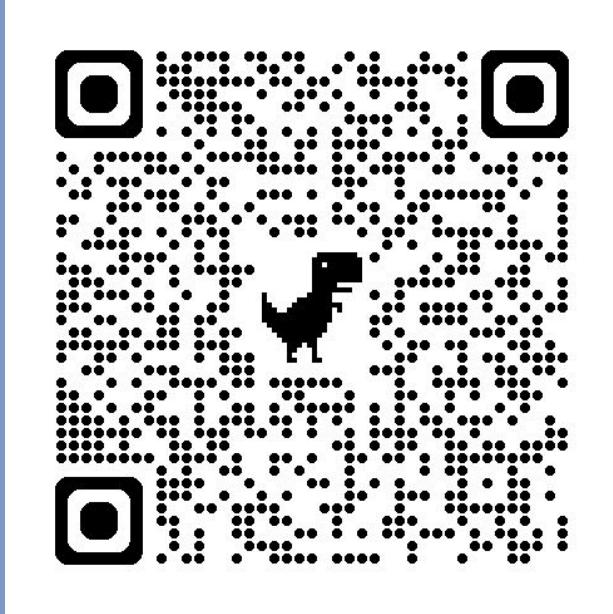
RSVP Now!

RSVP Form:





Sign in sheet



**Password:
Chance**



**Come to the front to ask
questions/meet the Board!**

Talk with us!

Follow us on Instagram

@bruinfinance

Link to our substack!



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Section





Capital Raising



What is it?

Jupiter is a gas giant and the biggest in the Solar System.

It's the fourth-brightest object in the night sky and was named after the Roman god of the skies



Why?

Jupiter is a gas giant and the biggest in the Solar System.

It's the fourth-brightest object in the night sky and was named after the Roman god of the skies



Steps

Saturn is a gas giant and has several rings and it's composed of hydrogen and helium. This planet was named after the Roman god of wealth and agriculture



What does IB do?



Mercury

Mercury is the closest planet to the Sun and the smallest one in the Solar System—it's only a bit larger than the Moon. The planet's name has nothing to do with the liquid metal, since Mercury was named after a Roman god



Venus

Venus has a beautiful name and is the second planet from the Sun. It's terribly hot—even hotter than Mercury—and its atmosphere is extremely poisonous. It's the second-brightest natural object in the night sky after the Moon





Advisory Service



Mars

Despite being red, Mars is actually a cold place. It's full of iron oxide dust, which gives the planet its reddish cast



Venus

Venus has a beautiful name and is the second planet from the Sun. It's terribly hot, even hotter than Mercury



Jupiter

Jupiter is a gas giant and the biggest planet in the Solar System. It's the fourth-brightest object in the night sky



Saturn

Saturn is a gas giant and has several rings. It's composed mostly of hydrogen and helium. It's the sixth planet from the Sun



M&A

Mars

Despite being red, Mars is a cold place. It's full of iron oxide dust, which gives the planet its reddish cast

Venus

Venus has a beautiful name and is the second planet from the Sun. It's terribly hot, even hotter than Mercury

Neptune

Neptune is the farthest planet from the Sun. It's also the fourth-largest planet by diameter in the Solar System

Earth

Earth is the third from the Sun and the only one that harbors life in the Solar System. We all live on

Saturn

Saturn is a gas giant and has several rings. It's composed of hydrogen and helium. It's the sixth planet from the Sun

Jupiter

Jupiter is a gas giant and the biggest in the Solar System. It's the fourth-brightest object in the night sky





Trade and Market Making

25%

Mars

Despite being red, Mars is a cold place. It's full of iron oxide dust

Jupiter

40%

Jupiter is a gas giant and the biggest planet in the Solar System



Mercury

It's the closest to the Sun and the smallest one in the Solar System

20%

Venus

Venus has a beautiful name and is the second planet from the Sun

15%

Follow the link in the graph to modify its data and then paste the new one here. [For more info, click here](#)

Storyset

Create your Story with our illustrated concepts. Choose the style you like the most, edit its colors, pick the background and layers you want to show and bring them to life with the animator panel! It will boost your presentation. Check out [how it works](#).



Pana



Amico



Bro



Rafiki

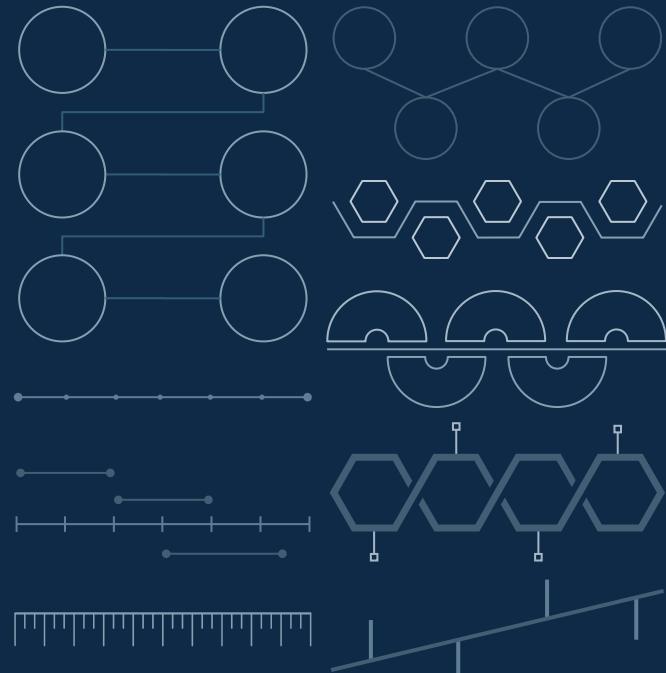
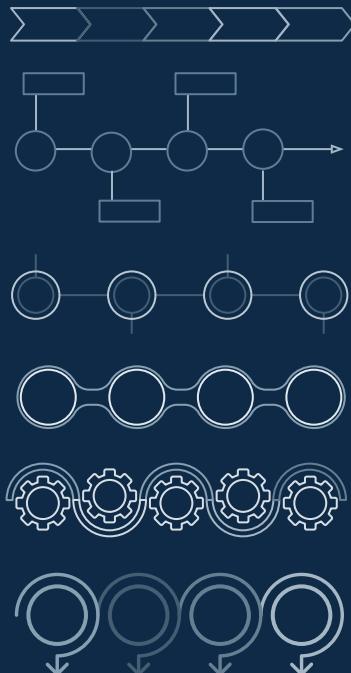
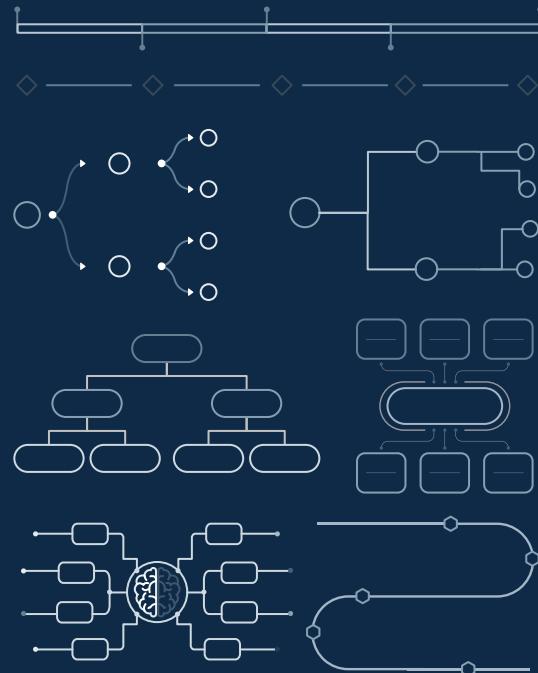


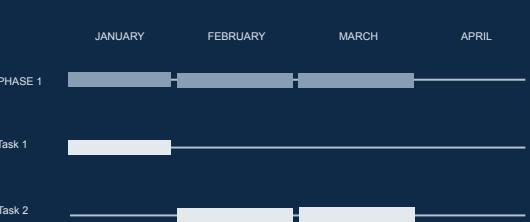
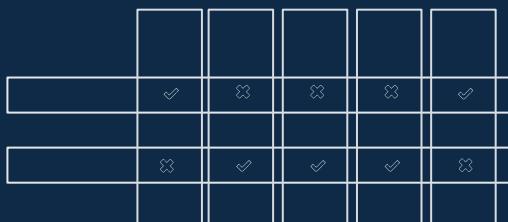
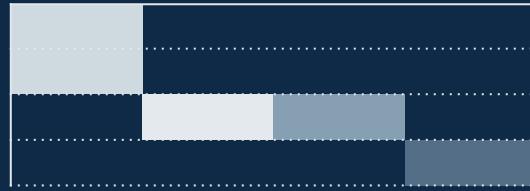
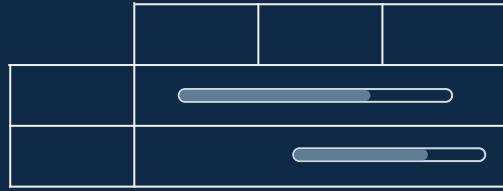
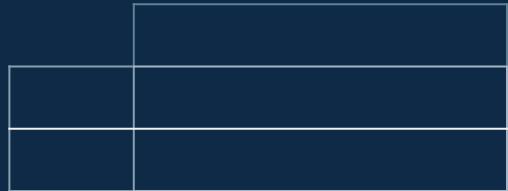
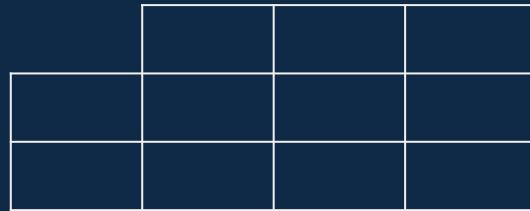
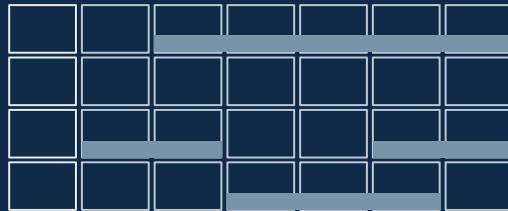
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Use our editable graphic resources...

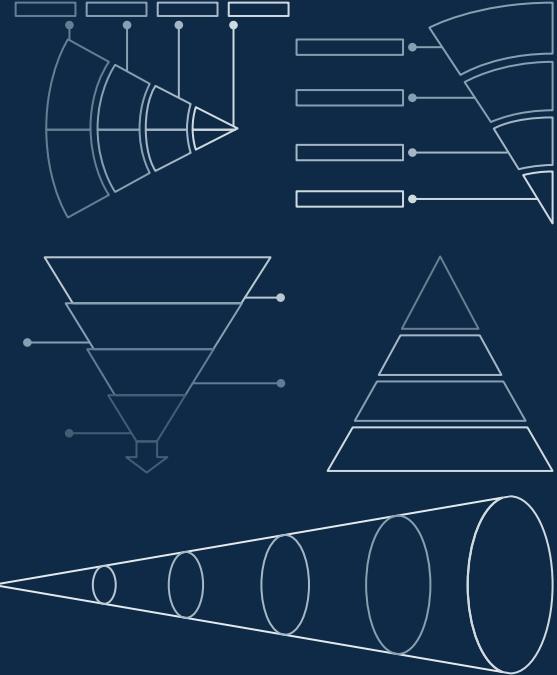
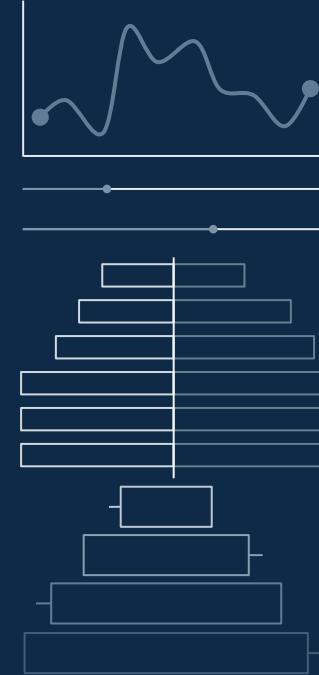
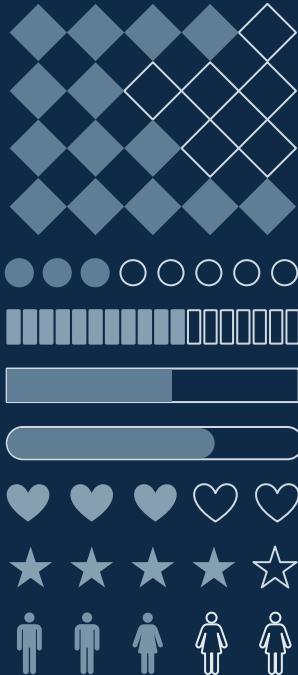
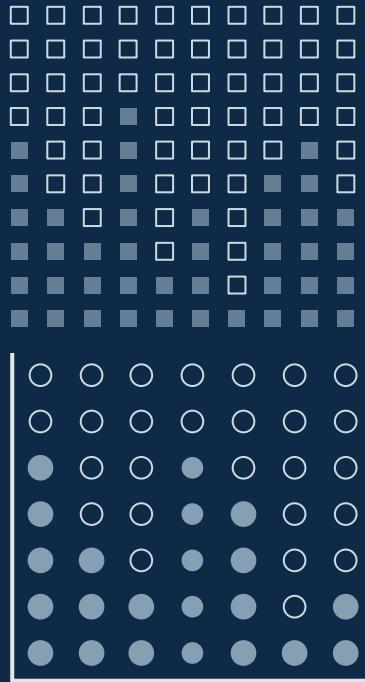
You can easily **resize** these resources without losing quality. To **change the color**, just ungroup the resource and click on the object you want to change. Then, click on the paint bucket and select the color you want. Group the resource again when you're done. You can also look for more **infographics** on Slidesgo.











...and our sets of editable icons

You can **resize** these icons without losing quality.

You can **change the stroke and fill color**; just select the icon and click on the **paint bucket/pen**.

In Google Slides, you can also use **Flaticon's extension**, allowing you to customize and add even more icons.



Educational Icons



Medical Icons



Business Icons



Teamwork Icons



Help & Support Icons



Avatar Icons



Creative Process Icons



Performing Arts Icons



Nature Icons



SEO & Marketing Icons



