



# 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

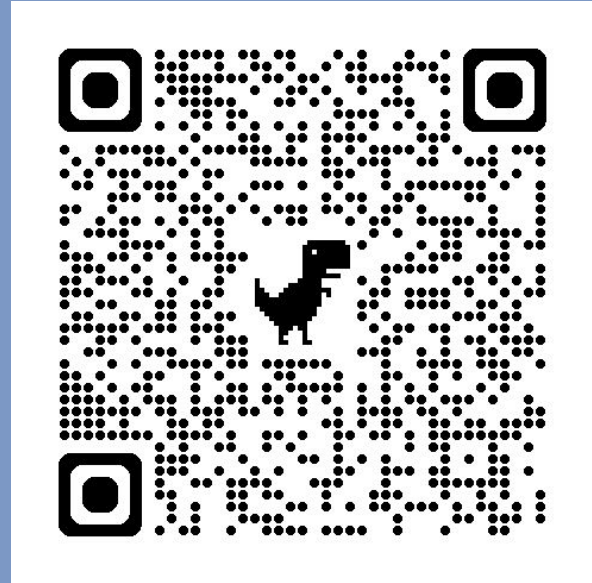
**Why:** meet investors from distinctive  
multistrategy hedge funds

**RSVP: [tinyurl.com/Almitas-Info](https://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

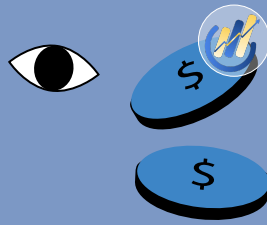


# Capital Raising



- **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



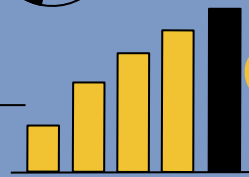
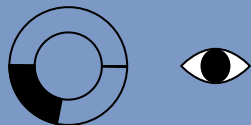
Investment  
App

## Bulge bracket banks

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

## Middle Market

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



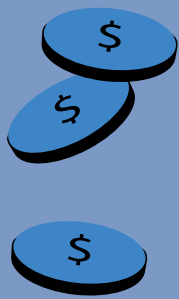
## Boutique

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

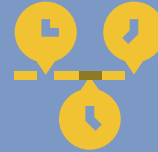
- 10-week summer internship
- Return offers



# Pros vs Cons of the industry



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

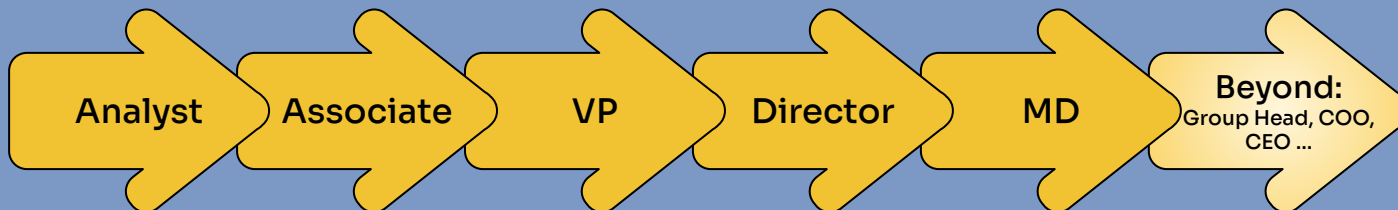


- Work/Life balance
- Pressure/stress
- Burnout
- Repetition
- Competition
- Transactional





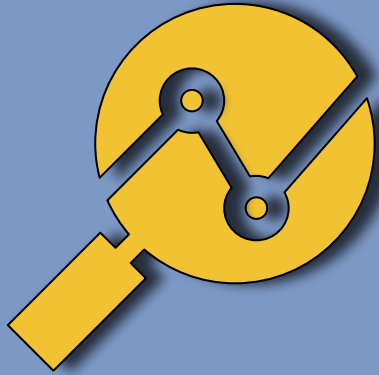
# Career Track







# Buy and Sell Side



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**Buy Side**



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**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

**BlackRock**

**KKR**

**APOLLO**

Venture  
Capital

**Accel**

**SEQUOIA**

Hedge  
Funds

**BRIDGEWATER**

**CITADEL**

**DE Shaw & Co**

Mutual  
Funds

**Vanguard**

**Fidelity**  
INVESTMENTS

Growth  
Equity

**GENERAL  
ATLANTIC**

**SUMMIT  
PARTNERS**

Pension  
Funds

**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



BoFA SECURITIES

## Banking (Corporate, Commercial)



HSBC



WELLS FARGO

## Sales



Deutsche Bank

## Trading

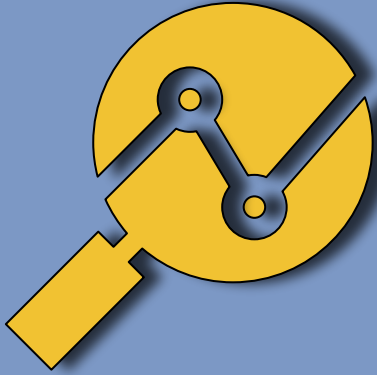


JPMORGAN  
CHASE & CO.





# Summary



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**Buy Side**



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**Sell Side**





# Resources





# IB 102



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7:30pm

Where: On Zoom

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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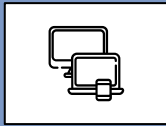
Section

**04**

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?

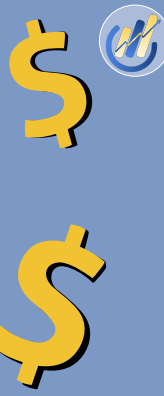
Jupiter is a gas giant and the biggest in the Solar System.

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

20%

## Mercury

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

40%

## Jupiter

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

15%

## Venus

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



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



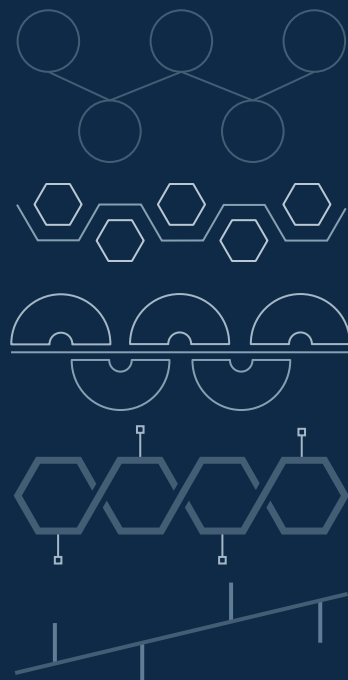
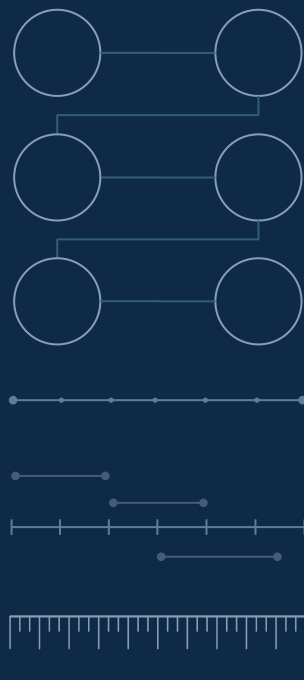
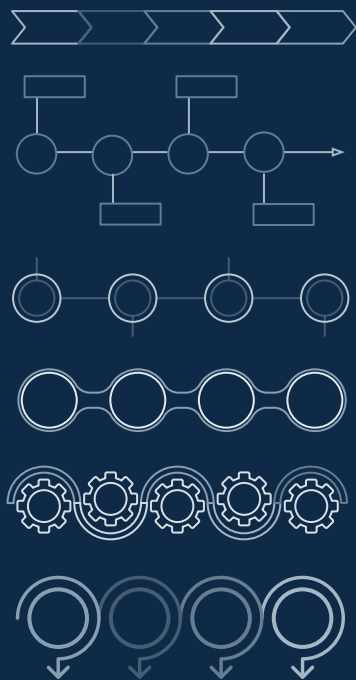
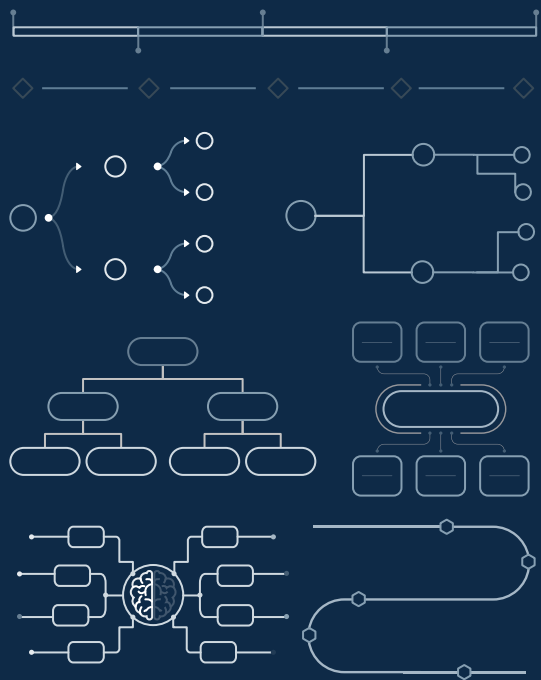
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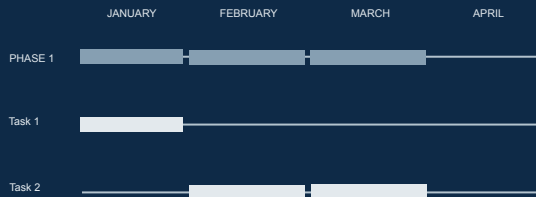
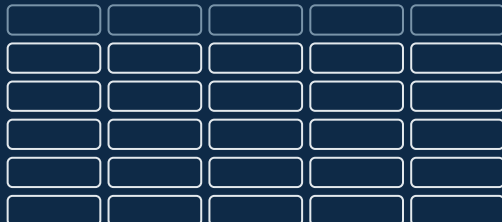
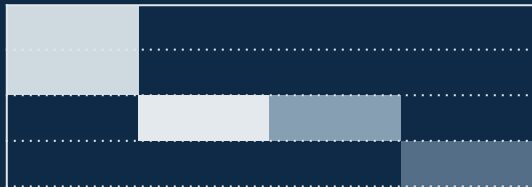
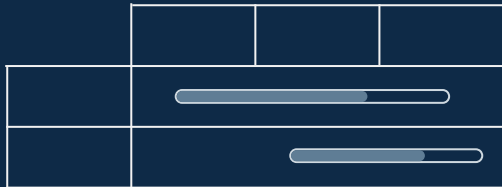
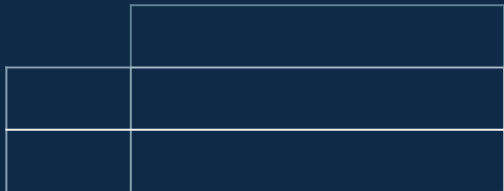
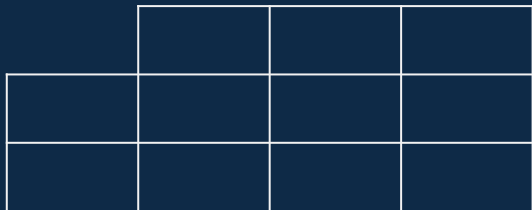
# Use our editable graphic resources...

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



