# MAP ‘LEGACY BOWL’ WEALTH MANAGEMENT FELLOWSHIP

MAP x MORGAN STANLEY PROPOSED CASE STUDY

### BACKGROUND

Morgan Stanley has long been a leader in wealth management, with $516 billion in assets under management and a global reputation for serving the unique needs of high-net-worth individuals. In recent years, the firm has sharpened its focus on clients in the sports, entertainment, and creative industries—individuals whose financial needs are both complex and highly personal.

In late 2024, Morgan Stanley’s Wealth Management division introduced the **Parametric Custom Core Sports League Strategy**, a first-of-its-kind portfolio that allows clients to invest in companies most closely tied to professional sports leagues. The offering, designed in response to growing client demand, enables investors to gain exposure to an asset class traditionally out of reach for most: the sports industry.

Key features of the strategy include:

* A $250,000 minimum investment threshold.
* A portfolio of 250–400 large-cap U.S. equities with deep sponsorship, advertising, or media ties to professional sports leagues.
* Risk characteristics that closely mimic the S&P 500.
* Proprietary data from Nielsen Sports to track visibility, spending, and engagement.

The initiative reflects Morgan Stanley’s commitment to innovation and to engaging clients not only as investors but also as passionate fans of sports and entertainment.

### BUSINESS SITUATION

The Parametric Custom Core Sports League Strategy presents both an exciting opportunity and a complex challenge for Morgan Stanley’s Wealth Management team. While the product has generated strong initial interest from high-net-worth clients, the bank must ensure that this offering is more than just a novelty. It needs to be positioned as a credible, performance-driven solution that can attract and retain investors with serious wealth management needs.

At the same time, Morgan Stanley is actively working to expand its reach among athletes, entertainers, and other professionals in the sports ecosystem—individuals who may be both emotionally drawn to the portfolio and financially qualified to invest. Successfully serving this market requires blending deep financial expertise with cultural fluency and trust-building.

### PROBLEM STATEMENT

Morgan Stanley must now determine how to **maximize the adoption and long-term success of the Parametric Custom Core Sports League Strategy** among high-net-worth clients, particularly athletes and sports-affiliated professionals.

Your team has been engaged to act as junior wealth management analysts supporting the Global Sports and Entertainment Division. Over the next two months, you will be responsible for:

1. Evaluating the risks, benefits, and potential market demand for this strategy.
2. Designing innovative, client-centered investment solutions that build upon or complement the Parametric Sports League offering.
3. Crafting a recommendation for how Morgan Stanley can best position this product to meet both the financial goals and the personal passions of its clients.

Your final presentation should clearly address:

* How your solutions reflect MS’s mission of convenient, customizable client experiences.
* How MS can strengthen loyalty among next-generation investors while continuing to serve its existing base.
* How your recommendations can be realistically scaled across the Parametric Custom Core Sports League Strategy model.

### DISTRIBUTION OF WORK

Teams will be organized into groups of **five**, adhering to a workflow that accurately reflects the operations of a quantitative finance desk: idea generation → modeling → testing → risk assessment → integration → reporting. Each student will receive a distinct "slice" of the project to guarantee a fair and equitable distribution of responsibilities.

1. Initiation Phase (Defining Scope & Direction)
2. Planning Phase (Structuring the Work)
3. Execution Phase (Building & Backtesting)
4. Control Phase (Risk Management & Adjustments)
5. Monitoring Phase (Ongoing Oversight & Alignment)

### “FINAL FOUR” DELIVERABLES

1. **Final Slide Deck**: A professional PowerPoint presentation (10–12 slides) that outlines the opportunity, model design, results, risks, and the client integration strategy.
2. **One-Page Fact Sheet**: An executive summary of the strategy, highlighting its objectives, key metrics, and performance achievements.
3. **Impact Statement**: A 1–2 paragraph reflection on how the strategy enhances the MS team’s ability to strengthen client relationships and maintain competitiveness.
4. **Final Management Presentation**: Students will present their final presentation to MS virtually on **Monday, December 8th.** This presentation will serve as their capstone project and will conclude their fellowship.