



FINANCIAL INNOVATION ANALYTICS

About Financial Innovation Analytics

Financial Innovations Analytics (FIA) is an student-led club here at SSFS made up of Upper School students who are passionate about innovation in the financial world, sponsored by SSFS, Young World Leaders Program, Hengxin Asset Management, Merrill Lynch, and Zhongtai International. FIA is composed of four main sectors: investment, education, technology, and research.

Investment: FIA has created an Investment Policy Statement and proposed the plan of managing a portion of the school's Endowment fund during the Finance Committee Meeting at Scott House; the plan was successfully approved. In addition, we have been working with 84'Alum, Aaron Meisner, almost weekly in creating our stock portfolio, and he has been a great help to our club. Our philosophy/method is Thematic Investment, focusing on big macroeconomic themes.

Education: FIA has planned on connecting with SSFS Middle School in creating a program, in which one of our members will come monthly to MS and spread the knowledge of finance and its greater implications. This program is currently being constructed in progress. Besides, FIA invited Aaron to come back to his school and we will be hosting an presentation, Inside the Business World: Finance & Innovations, on April 27th during Activity Time from 12:00-12:40. He will be talking about what the club has been doing as well as other fascinating elements of the world of finance and the field's broad applications. We are organizing educational trips to Merrill Lynch, Baltimore before the end of the year and will visit companies in DC metro area as well.

Technology: the technology section of FIA covers online promotion through Social Media including Facebook (Financial Innovation Analytics) and Instagram (Official_f.i.a) as well as website domain (fia-club.org). Taking a photo to capture a moment is also part of technology. Our members learn through the process of designing, advocating, and communicating.

Research: We have learned about specific stocks on the NASDAQ website and analyzed their P/E values. Based on our research and Merrill Lynch's analyst report, we have a greater sense and knowledge about a particular stock. Through analyzing companies, we are also learning about their products and how consumers view them. There are companies in different industries for us to explore.

Financial Innovation Analytics is a club that opens to anyone in public, and members will not only acquire knowledge about money but also its greater implications in the economy. FIA provides a platform for learning, leading, and building life skills that are crucial in the future. We are always looking for new members and would be happy to have you. Any questions, please contact Haoran.Zhu@ssfs.org