

PRIME NEWSLETTER



The Philadelphia Regional Investing Mentorship Experience
A Partnership of Penn Capital

Welcome PRIME Summer 2019 Intern!

The PRIME Program is excited to welcome Rachael Wright to our summer internship experience. Rachael is joining Penn Capital's investment team for six months beginning in April. Rachael will be entering her final year at Drexel this fall, pursuing her majors of Finance, Business Analytics, and Economics.

While at Penn Capital, Rachael will receive valuable, hands-on training and undertake numerous responsibilities. She will work with the portfolio managers and complete various projects tailored to her experience and interests.

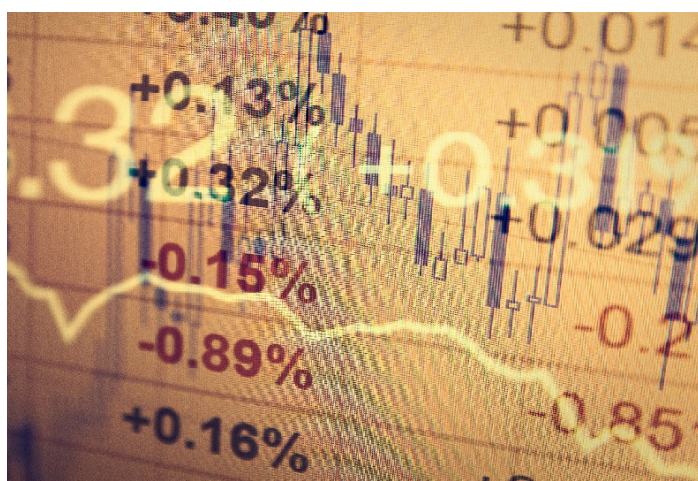
Prior to joining the PRIME Program, Rachael acquired finance operations, financial planning, and analytical skills through her other internships. She also participated in several on campus investment groups and activities, including portfolio management case studies. The PRIME Program will provide Rachael with a well-rounded experience as we take her through our internship curriculum. We look forward to future updates on Rachael's success throughout the summer!

PRIME: What's coming up?

April: Welcome Summer 2019 PRIME Intern!

May: Industry visit! Junior PRIME Class visits Penn Capital for the day.

June: Penn Capital Golf Outing benefiting the PRIME Scholarship Fund.



PRIME Class: Academy @ Palumbo

Our young women at the Academy @ Palumbo in Philadelphia have been enjoying their second year of the Program as they gain a better understanding of the stock market. Since the fall of 2018, each student has been participating in a stock simulator, investing \$1 million into the stock market. They have been exposed to the daily fluctuations in the market and have executed their trades accordingly. They continue to calculate their return on investment and research potential investment opportunities.

Our last workshop of the year "Intro to Careers in Finance and Financial Services" will be taught over two sessions in the spring. This workshop will focus on the opportunities that the financial industry has to offer. We will review qualifications needed for specific roles, and each student will take a financial industry-focused personality quiz to see where they fit. The year concludes with an industry visit when the class returns to Penn Capital for a day of education, mentoring, and fun!

PRIME Attends Diversity and Inclusion Conference

On the day before International Women's Day, PRIME attended the CFA Society of Philadelphia's Diversity and Inclusion in Investment Management Conference. It was an exciting day filled with amazing panels and topics. Industry power houses were represented, all declaring their plans for improving diversity and inclusion. A panel of professionals from local universities with diverse educational backgrounds spoke about their initiatives to prepare young women for the world of finance. It was a wonderful opportunity to discuss the issues and work together on finding solutions. PRIME was excited to be part of the conversation with so many inspiring women and looks forward to building relationships to help bring diversity to the industry!

PRIME Family in the Spotlight

PRIME volunteer, Lisa Matson will be speaking on a panel at the Ms. JD Annual Conference on Women in Law. Lisa is a Senior Partner and General Counsel at Penn Capital. She will be joined by other distinguished attorneys to speak about personal and professional experiences of gender bias, and how to improve on the issue.

*“Here’s to strong women.
May we know them.
May we be them.
May we raise them.”*

– Unknown

About Us

Penn Capital is an independent, employee-owned boutique investment management firm based in Philadelphia. We forge our own ideas, we respect hard work, and we are committed to our clients, our staff, and our community.

We are dedicated to being a partner in our community by combining our corporate resources with community needs through charitable contributions and employee involvement. The Penn Capital Philanthropic Committee is comprised of employees across the firm who volunteer their time and talents and who are responsible for creating and implementing the firm's philanthropic initiatives and volunteer opportunities.

Visit www.penncapital.com for more information on our firm.

Interested in learning more about the PRIME Program? Please contact Lindsay Heckman, PRIME Program Director, at Lheckman@penncapital.com.

