

The ANU Student Managed Fund (SMF) Alumni Corner: Saurav Patel



Saurav is a final year undergraduate student studying a Bachelor of Finance at the ANU. Aside from his studies, he has more than two years of experience in Dixon Advisory as a Wealth Analyst and currently serves as a member on the Youth Advisory Committee for AMP Capital.

Saurav started in the SMF as a junior analyst with a split role in both the Relationship Team and Risk & Compliance (R&C) Team. He took on the role of Chief Investment Officer (CIO) in his second semester with the Fund.

Saurav's Experience in the SMF:

What did you get out of your roles in the Student Managed Fund (SMF)?

My first semester in the SMF as a junior analyst with the R&C and Relationship Teams was a unique and precious opportunity to be involved in the activities of two teams. This allowed me to learn a lot from both the technical and the soft-skill sides.

I was appointed the CIO in my second semester in the SMF. It was a very challenging position, but I really enjoyed the role as a completely different experience compared to my first semester. The experience helped build my soft skills, especially around leadership. It also gave more exposure to the professional and business environment, which really benefited both my studies and career.

We notice that you're working with Dixon Advisory part-time as well as being a Youth Committee member for AMP Capital, doing both while studying. Did your SMF experience help prepare you for these roles?

The SMF experience was a great help in transitioning from studies to working in industry. I was very fortunate to work for Dixon Advisory through the CBE Internship Program while undergoing my first semester in the SMF. The skills I honed in the SMF, such as communication and public speaking, had a very positive influence on my performance at work. The SMF was valuable for developing these practical skills that would never be obtained in textbook and lecture-oriented courses. On top of this, the SMF not only expanded my networks, but also my networking skills. This gave me the ability to engage with experts in the finance industry, and was my stepping stone to becoming a Youth Advisory Committee Member in AMP Capital.

What was the biggest challenge you overcame during your time in SMF?

I believe the biggest challenge was learning how to perform like an industry expert: the SMF pushes you to do so unlike any other course. Taking on my assigned roles in the R&C and Relationship Teams was initially very challenging, as it takes time to learn, understand, adapt and improve on the necessary skills and knowledge for the positions. Especially when it involves managing real money, and our ability to support scholarship recipients depends on the Fund's performance. As CIO in my second semester in the Fund, my biggest challenge was dealing with the uncertainty surrounding my leadership responsibilities, since the SMF is purely student-driven. However, it was a great opportunity to take the initiative by identifying those responsibilities while adapting to the leadership role. I tried to foster communications and integration between the four capable sub-teams (Asset Allocation, Active Australian Equities, R&C and Relationship Teams) to strengthen the bonds within the SMF by encouraging cross-team participation in meetings and collaboration over work and ideas. The SMF has cultivated a great culture that I hope future cohorts will promote and pass on.