



Beta Sigma Investment Group Newsletter | November 3, 2025

We are thrilled to introduce the Beta Sigma Investment Group (BSIG) Newsletter—a quarterly publication designed to strengthen the connection between current members and our extensive TKE Beta Sigma alumni network. This newsletter will serve as a hub for updates on our fund’s performance, professional development initiatives, mentorship opportunities, and philanthropic efforts.

As we build upon our legacy, we hope this newsletter becomes a valuable resource for both current members and alumni alike.

We welcome your input! If you have suggestions, feedback, or ideas, feel free to contact us. For more information about BSIG or ways to get involved, reach out to our Co-Presidents, [Noah Hanning](#) (BΣ 1990) & [Dylan Tuncel](#) (BΣ 2006), or our Chief Operating Officer, [Aidan Foley](#) (BΣ 2023).

Thank you for your continued support and for being a part of the BSIG journey.

About Beta Sigma Investment Group

Founded in 2016, Beta Sigma Investment Group (BSIG) is a student-led investment fund managing a portfolio of public, long-only equities on behalf of the USC TKE (Beta Sigma Chapter) endowment, with an AUM of ~\$725K. Learn more on our BSIG [website](#).

Members gain hands-on investing experience by researching positions, pitching stocks, and refining their investment strategies. Our senior leadership provides foundational training, equipping analysts with the fundamental skills necessary for success in financial services. Through guest lectures from industry professionals, members gain valuable insight into careers in investment banking, private equity, growth equity, venture capital, hedge funds, consulting, and a multitude of other finance fields.

We take pride in being the first fraternity-founded endowment fund in the US, committed not only to generating returns but also to professional and personal development that extends beyond the university.

Fund Performance

Beta Sigma Investment Group currently manages two funds—Growth Fund I and Growth Fund II—each following distinct strategies aimed at long-term capital appreciation. While both portfolios share a disciplined research process grounded in fundamentals and valuation, they differ in breadth, sector exposure, and volatility management.

Beta Sigma Growth Fund I | Returns: 16.34% YTD

With 22 positions, Growth Fund I reflects a value-growth approach, prioritizing on investing in growth-oriented equities at reasonable price-points. The Fund blends large-cap technology names like Apple (**AAPL**), Meta Platforms (**META**), and Alphabet (**GOOGL**) with high-conviction cyclical and defensive holdings such as Costco (**COST**), Lockheed Martin (**LMT**), and United Health Group (**UNH**). This breadth has allowed the Fund to benefit from multiple market drivers simultaneously—tech momentum, healthcare resilience, and consumer strength.

Notable Holdings:

- **Meta (+6.42% YTD)** and **Apple (+10.25% YTD)** anchor the Fund's long-term growth, benefiting from consistent earnings and dominant market positions.
- **Lockheed Martin (+1.18% YTD)** and **Costco (+2.00% YTD)** provide resilience in times of market volatility.
- **Alibaba (+97.40% YTD)** rebounded amid improved investor sentiment toward Chinese equities and AI integration within its platform.

Draggers:

- **Novo-Nordisk (-43.89% YTD)** and **SentinelOne (-21.67% YTD)** detracted modestly, reflecting the challenges in retail and cybersecurity valuation compression.

Beta Sigma Growth Fund II | Returns: 49.97% YTD

After a successful capital raise during Q2 2025, we launched Beta Sigma Growth Fund II. Its core equity holdings include Celestica (**CLS**), Blue Bird Corp (**BLBD**), and Nike (**NKE**).

Through exposure to broad market ETFs (**SPY**, **QQQ**), Fund II emphasizes efficiency and benchmark correlation while maintaining select alpha opportunities through individual equities.

Notable Holdings:

- **Celestica's (+275.00% YTD)** return showcases the success of identifying mid-cap technology supply chain opportunities early. Its substantial return reflects the market's strong sentiment surrounding AI Infrastructure.
- **Blue Bird's (+33.58% YTD)** performance solidifies the positive outlook for clean energy solutions, particularly within the automobile industry.

Alternative Investment Opportunity

As of Q3'25, our student-led investment fund, supported by our Board of Directors, comprised of recent alumni, will begin underwriting prospective early-stage opportunities. By combining student initiative with alumni expertise, the fund provides hands-on exposure to alternative asset investing, due diligence, and startup valuation.

Philanthropy: Our Commitment to St. Jude Children's Research Hospital

At BSIG, we are committed to making a meaningful impact through giving back to our community. While we are dedicated to maximizing returns and fostering professional growth, we are equally committed to making an impact beyond finance. For these reasons, St. Jude Children's Research Hospital remains our primary philanthropic partner.

St. Jude's mission—to provide life-saving treatment to children regardless of their families' ability to pay—resonates deeply. Through fundraisers, donation drives, and direct contributions from our investment profits, we have donated over \$40,000 to philanthropic causes.

Mentorship Program: Connecting Students with TKE Alumni

Leveraging the power of the TKE USC alumni network, BSIG launched a Mentorship Program in Spring 2024. The program matched 12 student mentees with alumni across investment banking, private equity, and consulting. Several participants landed competitive job offers, solidifying the program as a cornerstone of BSIG's future.

That success has resulted in the 2024-25 Mentorship Class doubling in size, with many new mentors joining through referrals from last year's participants. Such organic growth is a reflection of the growing impact of the program and the dedication of TKE Beta Sigma's alumni network.

As BSIG and TKE's Beta Sigma chapter continues to grow, so too will our mentorship program, ensuring every student receives the guidance and networking required to break into competitive industries.

If you are a USC TKE alumnus interested in becoming a mentor, please reach out to:

- Noah Hanning (nhanning@usc.edu)
- Dylan Tuncel (dtuncel@usc.edu)

Looking Ahead: Our Goals for 2025

As we step into a pivotal year for **BSIG**, we are excited to continue building momentum. Our goals for **2025** include:

- Growing our AUM to further solidify BSIG's presence as a premier student investment fund.
- Expanding our philanthropic contributions to St. Jude's, reinforcing our commitment to making a tangible impact.
- Scaling our mentorship program to include alumni across all industries, helping as many TKEs as possible.
- Expanding our guest speaker network, bringing in seasoned industry veterans across financial services.

How You Can Get Involved:

At BSIG, we believe our strength lies in our network. The guidance, generosity, and support of alumni, mentors, and industry professionals have been instrumental in shaping our success. Here's how you can make an impact:

1. Be a Guest Speaker

We are always looking for experienced professionals to share insights with our members. If you work in finance, consulting, tech, or other industries, your perspective can inspire the next generation of leaders.

2. Join Our Mentorship Program

Mentorship is a key driver of success at BSIG. If you're interested in mentoring a student or offering career advice, we'd love to connect you with a mentee.

3. Stay Connected & Learn More

Curious about our portfolio, investments, or philanthropic efforts? Reach out to Dylan and Noah to discuss BSIG's work and potential collaboration opportunities.

4. Support Our Philanthropy

Passionate about giving back? Join us in supporting St. Jude Children's Research Hospital. Whether through donations or fundraising efforts, your involvement helps us maximize our impact.

Final Thoughts

As we continue to build the future of BSIG, we are grateful for the unwavering support of our alumni, mentors, and broader TKE community. Your involvement, whether as a mentor, speaker, donor, or supporter, ensures that BSIG remains a powerful force for growth and opportunity.

We look forward to an exciting year ahead and can't wait to share our progress with you in future editions.

For any questions, opportunities, or ways to get involved, please reach out to our leadership team.

Thank you and all the best,

Noah Hanning and Dylan Tuncel