

# STREAM

Strengthening Racial Equity in Asset Management

Dear Partner,

We are excited to share our letter for the quarter ended September 30, 2022, and to update you on our performance and outlook for the organization. We successfully wrapped up our 2022 internships during the quarter, which we celebrated with our 18 interns and many of our industry supporters on the Old Parkland campus in Dallas. We had amazing interns in 2022, and we look forward to informing you on their career successes in future updates. STREAM will continue to support them as they make their way within the asset management industry. We would specifically like to thank our internship host partners, all of whom have signed on to provide an internship in 2023! Thank you for being a member of our team as we tackle this critical issue.

## Performance since Inception

Applicants	Internships	Scholarships \$ / pay	Educational Engagements	HS Stock Challenge Participants
302	24	\$240,000	41	151

## Performance

As mentioned, we wrapped up our 2022 internship program during the quarter. We would again like to congratulate our 18 interns and thank our 2022 internship hosts! Most of our interns were able to make it to Dallas for our Closing Ceremony in August and are pictured bottom left. Each intern and host firm is also separately listed at the end of this letter.

As mentioned in our last update, we have started expanding our reach, specifically into Denver and Charlotte. Partners in Denver and Charlotte will host several of our ~40 internships for 2023. We would particularly like to thank two of our current partners that have helped spearhead this expansion: [Delta-v](#) in Denver, and [Global Endowment Management](#) in Charlotte. In addition to helping us broaden our student outreach, employees of these firms have taken volunteer and leadership roles within STREAM, furthering our impact.

We pivoted the STREAM Summit to the fall to better align with our application period and were excited to welcome students to SMU on October 13th. More than 200 students attended either in-person or virtually to hear from our engaging panelists and speakers. Additionally, they had the opportunity to speak with recruiting companies about internship and full-time opportunities within the industry. These students came from 29 different colleges/universities! We were also happy to have several of our alumni in attendance, and we enjoyed our networking dinner with them immediately following the Summit. As previously mentioned, one of our priorities is to create an inclusive and supportive environment within the industry. To that end, we will continue our efforts to stay in front of our alumni – keeping them connected with each other and our team (including our mentors and student liaisons), as we continue advancing toward our ultimate goal of increasing senior/partner level diversity in asset management.





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We would also like to thank you for supporting STREAM on North Texas Giving Day in September, where we were able to raise \$46,250. This funding has been earmarked to support our 2023 interns by providing housing and travel assistance. These additional resources are the best way to ensure the top diverse talent around the country can participate in our program. With rent increasing, gasoline prices elevated, and internship opportunities doubling, we are truly grateful for your support on North Texas Giving Day!

### **Outlook**

Our 2023 internship application opened on September 1st and continues through the end of November. We thank you for allowing us to grow our impact. We had 6 interns in 2021, 18 in 2022 and are expecting ~40 in 2023 (The count is fluid, as we're currently finalizing several firms' commitments). On that note, it's not too late to offer an internship with access to all applicants. Please reach out if you are interested. Your interaction with our social media accounts to assist us in spreading the word about these internships is greatly appreciated!

We would like to thank our partners in the Charlotte community that made us a beneficiary of the [Invest for Charlotte 2022 Conference!](#) The event was a huge success, and it was an honor to speak about STREAM to a packed room of industry professionals wanting to make a bigger impact. We look forward to attending this annual event in future years.

Lastly, we are working on planning our annual High School Stock Challenge that will begin early next year. We're excited to partner with the same great non-profits from this year, and we look forward to providing more details in a future update. Please visit prior correspondence via website/socials/quarterly letters for more details about this initiative.

### **Closing Thoughts**

2022 is quickly coming to an end, and what a year it's been for our organization. We grew our internships 3x and expect to more than double that amount for 2023! We also launched our High School Stock Challenge where we hope to create industry/career awareness at a younger age and help foster the industry's pipeline of diverse talent. We're excited to see how much the challenge grows in 2023.

As always, it truly takes all of us to make meaningful change to correct the uphill climb we are facing. We appreciate your support in all forms! Please continue to interact with us on [LinkedIn](#) and [Instagram](#) as these platforms help us broaden our reach. If you'd like to more formally get involved, please email us. Thank you!

All our best,  
*The STREAM Team*



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## 2022 Intern Hosts



# STREAM

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## Business Partners



## Legal Partner



## Non-profit Collaborations



## Recruiting Collaboration





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## 2022 STREAM Interns

Ahmed Abbasy - [Crestline](#)

Angel Rodriguez Torres - [Crestline](#)

Brandon Dean - [Webs Creek](#)

Brisa Briones - [STREAM](#)

Destiny Smith - [Highside Global](#)

Daniela Guadarrama - [Hudson Way](#)

Elizabeth Low - [Delta-v Capital](#)

Evin Samy - [Fund Evaluation Group](#)

Favian Arreola - [Regan Capital](#)

Kavya Muralidhar - [BWCP](#)

Keke Burns - [Ranger](#)

Lino Alanis Ocampo - [Cambridge](#)

Matt Starr - [Crestline](#)

Norma Elias - [Socorro](#)

Sameen Rahman - [Barrow Hanley](#)

Teja Desai - [Carnelian Energy](#)

Vanessa Guerra - [Hazoor](#)

Yafet Alefnew - [CH Investment Partners](#)