Presented by Citi

Example Case from October 2019 Wellesley Case Competition

You are a desk strategist in equities covering the consumer staples sector. The head trader from a key hedge fund client calls to ask your view on the following names: Proctor & Gamble (PG), Clorox (CLX), Coca Cola (KO), Kraft Heinz (KHC), Tyson (TSN). The trader is looking for your opinion on both the overall sector as well as these individual names.

- Give an overview of your macro outlook for the consumer staples industry. (Consider the U.S. election, COVID-19 pandemic, consumer confidence, etc.)
- Pitch your top long position and your top short position from the 5 consumer staple names listed on the previous page.
- What are the biggest catalysts that you will consider as part of your investment thesis?

You are expected to answer these questions in a clear and concise format. Please prepare a small slide deck with at least 3 slides. Each team will have 5 minutes for presentation and Q&A. You are evaluated on your investment rationale as well as delivery.