
PENNWEST STUDENTS COMPETE IN CFA INVESTMENT RESEARCH CHALLENGE



February 23, 2026

Three PennWest University students recently stepped onto a regional stage to showcase their financial analysis and presentation skills at the CFA Society of Pittsburgh’s Investment Research Challenge.

On Tuesday, Feb. 17, 2026, juniors Isaac Bell and Chase Weaver from the Edinboro campus and senior Maddox O’Neill from the California campus represented PennWest University at the CFA Society of Pittsburgh competition. The team delivered a 10-minute presentation based on a comprehensive investment analysis of Howmet Aerospace, a publicly traded company headquartered in Pittsburgh.

Held at the Rivers Club in downtown Pittsburgh, the event marked a milestone for PennWest as the university’s first team to compete in the global challenge. Over several months, the students developed a detailed, 16-page investment analysis report evaluating Howmet Aerospace’s financial performance, competitive positioning and investment potential.

The PennWest team competed against students from West Virginia University, Penn State Behrend, University of Pittsburgh and Robert Morris University.

For the students, the challenge offered a rare opportunity to apply classroom concepts to a professional-level project.

“The Investment Research Challenge, hosted by the CFA Society of Pittsburgh, provided me with valuable real-world financial analysis, report writing and presentation experience,” said Weaver, a [finance and personal financial planning major](#) from Titusville, Pennsylvania. “Our PennWest team analyzed Howmet Aerospace, developed an investment recommendation and presented our findings to a panel of industry professionals. I would recommend this challenge to any student, as it provides valuable experience beyond the classroom.”

Bell, who served as team leader, emphasized the practical learning benefits.

“The CFA Institute Research Challenge was a unique and rewarding opportunity for us to gain hands-on experience in the field of equity research,” said Bell, who is pursuing a degree in [mathematics](#) with a concentration in [actuarial science](#) and minors in [computer science](#) and [finance](#). “Personally, I significantly developed my financial modeling and analysis skills, while also strengthening my presentation abilities. Students who are interested in finance and enjoy learning by doing should take advantage of the experience.”

O’Neill described the competition as both meaningful and motivating.

“The competition was an honor and privilege to be able to participate in and represent PennWest as a university,” said O’Neill, a [finance and personal financial planning](#) major from Sharpsville, Pennsylvania. “It was a great opportunity to gain insight into the field of financial analysis and provides a unique experience that you do not get out of your normal class.”

This year’s team was co-advised by Drs. Christian Ola, Shaun Pfeiffer, Melissa Gibson and Anthony Esposito. Additional faculty contributions came from Drs. Jingze Jiang and Edmund Matecki.

The experience reflects PennWest’s emphasis on cross-campus collaboration and experiential learning, bringing together students from multiple campuses to work on a single, high-impact project.

Students interested in PennWest’s academic programs within the Department of Business, Economics and Communication can contact:

- **Finance Programs:** Dr. Christian Ola, 412-327-8386, ola@pennwest.edu
- **Communication Programs:** Dr. Melissa Gibson, 814-732-1592, mgibson@pennwest.edu
- **Personal Financial Planning (PFP) Programs:** Dr. Michael Engdahl, 716-485-1409, mengdahl@pennwest.edu

Competitions like the CFA Investment Research Challenge continue to provide PennWest students with opportunities to refine technical expertise, strengthen communication skills and gain firsthand experience in their chosen fields.



Drs. Anthony Esposito, Christian Ola, Melissa Gibson and Shaun Pfeiffer, members of PennWest's Department of Business, Economics and Communication.