

FINC 4541-Investment Analysis
Course Outline
Summer 2015

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Office Hours: MTWRF 10:00-12:00 P.M.
Office: Adamson Hall 205A

(You are WELCOME to drop in any time I am in the office)

I. Catalog Description:

Study of securities markets and security analysis for portfolio planning.

II. Required Background or Experience:

- A. Prerequisites: FINC 3511 or equivalent
- B. Prerequisite Justification:
In depth knowledge of present value analysis and methods of valuation of securities is required. These topics are covered in FINC 3511.
- C. The course uses the writing skills developed in English courses and ABED 3100.

III. Expected Outcomes:

- A. Understand the operational mechanics of securities markets (LG 4, 5, 6)
- B. Develop the ability to interpret financial statements and financial information (LG 4, 7)
- C. Improve analytical skills and critical thinking necessary to value and evaluate alternative investment decisions (LG 2, 4, 7)
- D. Improve written communications skills through preparation of investment projects (LG 1, 6, 7)
- E. Conduct research (library/internet) necessary to make investment decisions (LG 3, 4, 6)
- F. Develop a knowledge of equity and fixed income portfolio valuation (LG 2, 4, 7)
- G. Understand the use of futures and options in portfolio management (LG 2, 4, 7)
- H. Become familiar with global financial markets and portfolios (LG 5, 7)

IV. Text and References

Text: Investments: Analysis and Management: 12th edition, Charles Jones (11th Edition is also acceptable)

Supplementary Material: Value Line, Morningstar Mutual Funds.

V. Special or Unique Student Materials:

Financial calculator such as the TI-83plus, TI-BAII plus, HP-10b. **Devices with a wireless connection (e.g. iPhone, Blackberry, iPad) are not allowed for test taking.**

Subscription or access to Wall Street Journal

VI. Special or Unique University Facilities:

Access to the Business School Computer Lab and the Internet are required for investment projects.

VII. Expanded Description of the Course and Instructional Methods:

A. Expanded description of the course:

This course examines investment analysis from the standpoint of the individual. Topics include investment alternatives, security markets, trading procedures, bond valuation, stock valuation, market indices, and mutual funds.

B. Instructional Methods

1. Lecture, discussion, problem solving, and applied projects.
2. Videotapes: Analyzing Mutual Funds.

VIII. Methods of Evaluating the Outcomes:

A. Grading Policy (approximate/point basis)

Midterm examinations (2)	200 points
Final examination	100 points
Projects/HW	As assigned

B. Extra Credit: There is no extra credit in this course beyond that explicitly stated in the course syllabus.

C. Work From Other Courses: Work submitted for credit in other courses will not be accepted for credit in this course.

D. MY.WESTGA.EDU: The policy of the University of West Georgia is that each student is responsible for checking his/her my.westga.edu e-mail account on a regular basis.

E. Administrative Policies

1. Class attendance is strongly recommended.

2. No makeup tests/quizzes.
3. You are responsible for knowledge of any administrative announcements (test information, schedule changes, etc. that are made during class).
4. Tests/quizzes will be announced in advance.
5. I prefer not to write letters of recommendation for law school.

IX. Tentative Schedule:

<u>Date</u>	<u>Chapter</u>	<u>Topic</u>
06/29	1	Introduction
06/30	2	Financial Securities
07/01	-	Retirement Accounts
07/02	4	Security Markets/Indexes
07/06	5	Trading Securities
07/07	6	Risk
07/08	13	Economy/Market Analysis
07/09	14	Sector/Industry
07/10	16	Technical Analysis
07/13	--	
07/14	15	Company Analysis
07/16	--	
07/16	10	Common Stock Valuation
07/17	--	
07/20	17	Bond Pricing
07/21	3	Mutual Finds
07/22		Portfolio Formation

Final Exam: **Friday, July 24, (12:30- 2:30)**

Last day to withdraw: July 10