

FINC 4541-Investment Analysis
Course Outline
Summer 2018

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

Additional Contact Information:

I am on the road much of May and June, but I check email often. Please send all email to my UWG account (jyoder@westga.edu). I will notify you by course den email when I am in town and available to meet.

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: 13th edition, Charles Jones (12th 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
Quizzes	30 points
Project (Retirement Plan)	10 points

I guarantee the traditional grading scale of $A \geq 90$, etc. but reserve the right to “curve” if it helps the student.

Tests and quizzes will be online at your pace. However, the following **DEADLINES** must be met:

July 08 (11:30 pm)	Quiz 1 and Test 1
July 15 (11:30 pm)	Quiz 2 and Test 2 and Project (Retirement Plan)
July 23 (4:00pm)	Quiz 3 and Final

- 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.

IX. Online Schedule:

The course is strictly online. The material on course den is broken down into learning modules for the first midterm exam, second midterm exam, and the final exam. I have narrated power point slides. In addition there are narrated power point slides that refer to a word document. This is because I can't get narration onto a word document. In addition, there are some optional Youtube videos that may be helpful. If these videos cover material that isn't covered in my narrated PP slides or the book you don't need to worry about it.

Please be sure to adhere to the Deadlines to complete quizzes and tests above.

X. Suggested Schedule for Session IV:

<u>Date</u>	<u>Chapter</u>	<u>Topic</u>
06/27	1	Introduction
06/28	2	Financial Securities
06/29	-	Retirement Accounts
07/02	4	Security Markets/Indexes
07/03	5	Trading Securities
07/04	July 4th	
07/05	6	Risk
07/06	13	Economy/Market Analysis
07/09	14	Sector/Industry
07/10	16	Technical Analysis
07/11	--	
07/12	15	Company Analysis
07/13	--	
07/16	10	Common Stock Valuation
07/17	--	
07/18	17	Bond Pricing
07/19	3	Mutual Finds
07/20		Portfolio Formation

Last day to withdraw with grade of "W" July 10