



Professor

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Learning Outcomes

Upon completion of this course students will be able to

- formulate Investment Policy Statement and make asset allocation decisions for individual and institutional investors.
- apply the valuation theory to a range of investments.
- apply macro-analysis and micro-valuation of the stock market; conduct industry analysis, company analysis, and stock valuation.
- apply technical analysis in stock and bond valuation.
- formulate equity portfolio management strategies.
- formulate bond portfolio management strategies.
- evaluate equity and bond portfolios with various techniques.

Course Objectives

This course will cover the following content:

*See weekly schedule.

Course Schedule

Date		Topic	Textbook
		Tues. Sept 8 College-wide Orientation Day Wed. Sept 9 Classes begin Mon. Oct 12 Thanksgiving Day – no classes Wed. Nov 11 Remembrance Day – no classes Thur. Dec 10 Last day of regularly scheduled classes	
Sept	11	Asset Allocation	Ch 2
	18	Analysis of Financial Statements	Ch 10
	25	An Introduction to Security Valuation	Ch 11
Oct	2	Microanalysis and Micro valuation of the Stock Market	Ch 12
	9	Industry Analysis	Ch 13
	16	Company Analysis and Stock Valuation	Ch 14
	23	Company Analysis and Stock Valuation (continued) Exam #1	Ch 14
	30	Technical Analysis	Ch 15
Nov	6	Equity Investment Strategies	Ch 16
	13	Bond Portfolio Strategies	Ch 19
	20	Bond Portfolio Strategies (continued) Evaluation of Portfolio Performance	Ch 19 Ch 25
	27	Evaluation of Portfolio Performance (continued)	Ch 25
Dec	4	Professional Money Management, Alternative Assets, and Industry Ethics Code of Ethics and Standards of Professional Conduct Investment Report and Securities Analysis Presentations Exam #2	Ch 24 Appendix B
Dec	4	Investment and Securities Analysis Reports Due	
	12 - 22	Final Exam Period	

