

Business Administration

Course Number: **BUAD 450**

Course Title: **INVESTMENT MANAGEMENT**

Credits: 3

Calendar Description: In this course students will gain the knowledge and skills required for success as an investment professional or an individual investor. Topics include investment and portfolio theory, techniques for security analysis (fundamental and technical), valuation and management of various investment products, international investing, and portfolio management and performance evaluation. Careers and ethics in investment management will be discussed.

Semester and Year: **FALL 2023**

Prerequisite(s): BUAD 350, and third-year standing

8.8 reW nBT-0.005 Tc 0.00



Professor

Elena Mitropolsky <i>Course Captain</i>	C143	emitropolsky@okanagan.bc.ca

Learning Outcomes

Upon completion of this course students will be able we 9owlFm43

recommendation in a short research note. If you are an OCSIF member, you will be pitching your bond/pref to the fund as a potential investment.

Group Project – Stock Analysis and Valuation

Each team will be assigned a publicly traded company to perform in-depth analysis and valuation for portfolio investment purposes. The deliverables include a sell-side investment report and presentation to the class, and an Excel model to be submitted and used during presentation

Required Texts/Resources

Required:

1. Investment Analysis and Portfolio Management, Reilly, Brown, Leeds, 11th Edition, Nelson Education, 2019
2. Valuation, 7th edition, Measuring and Managing the Value of Companies, Koller, Goedhart, Wessels, McKinsey and Company, Wiley

A free e-book is also available through the Library

VALUATION: MEASURING AND MANAGING THE VALUE OF COM

Link:

Course Schedule

<p>2023 Week of:</p>	<p>5 (Feb 6) 4 (Sep 1) 6 (Oct 1) 5 (Nov 1) 14.2 (bTw 9.12 t)-3 (0.0(day)23.3 (</p>
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