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### **BFIN 420.02: Investments**

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**Finance 420**  
**University of Montana**  
**School of Business Administration**  
**Syllabus, Fall Semester 2014**

**Professor:** Dr. Keith Jakob

**Course Title:** Investments

**Class Time:** Section 1- 12:40-2:00 MW, Section 2- 2:10-3:30 MW

**Classroom:** GBB L11

**Office:** GBB 318      **Phone:** (406) 243-6159

**Email:** keith.jakob@business.umt.edu

**Web Page:** <http://www.business.umt.edu/FacultyStaff/KeithJakob.aspx>

**Office Hours:** Monday and Wednesday: 11:00 a.m. – 12:30 p.m. I will also be available by appointment. If I am in my office please feel free to stop by.

**Course Overview**

Finance 420 is designed to be a foundation course in the field of investment analysis for the undergraduate student. Upon completion of this course, students should have an understanding of security pricing, portfolio formation, investment terminology and various concepts underlying the valuation of securities in a dynamic marketplace.

**Course Prerequisites**

Completion of lower core & grade of C or better in BFIN 322.

**Required Materials**

**Text:** Bodie, Z., Kane, A., Marcus, A., Essentials of Investments, 9th ed., Irwin/McGraw-Hill

**Homework Manager:** This comes with the new text when purchased at the bookstore. It can also be purchased separately or with an ebook at my connect site. Simply hit “register now” The price separately is \$75. **With Connect Plus you can buy the connect homework tool and the complete Ebook for \$130.00.**

<http://connect.mheducation.com/class/k-jakob-sections-1-and-2>

**Calculator:** A financial calculator is needed. Only two models are acceptable. I will use the TI BA II Plus. You may also use the TI BA II Plus Professional Model. No other device will be tolerated during exams. No other calculators, PDAs, cell phones or high tech gadgets!

**Attendance**

Your attendance and participation are essential to an understanding of the course material. Students who do not attend my class on a regular basis generally earn much lower grades. I expect to see you in this class! Please sit in the same spot for each session, and bring and display your table “name tag” to every session for the whole semester!!! This will help me to get to know you.

## **Grading**

Final class grades will be based on the following:

Homework Manager Connect Assignments	(13%)
Midterm 1	(29%)
Midterm 2	(29%)
Final Exam	<u>(29%)</u>
	(100%)

Individual exams will not be assigned letter grades. A final curve may be given at the discretion of the professor. Exam grades will be posted on Moodle after each exam. Online Homework grades can be viewed on the Connect system.

## **Textbook Homework**

Regular ungraded textbook homework will be assigned. The weekly reading and these exercises must be done in order to do well on exams. Come prepared to discuss (with a loud and clear voice) chapter assignments each week and to go over assigned problems in class. Do the problems before we discuss them! Students who do not complete the homework on a regular basis earn much lower grades.

## **Homework Manager**

Homework manager questions for this class are on:

<http://connect.mheducation.com/class/k-jakob-sections-1-and-2>

These homework problems are worth 13% of your overall grade. You can redo these assignments as many times as you would like before each due date. You can also see if you have the answer correct before you move onto the next question. (check my work) It will only show the correct answer when you actually grade the assignment. I will keep your best score for the assignment. The Connect tool can change the numbers in the problem each time you re-attempt the assignment. The due dates for the assignments will be listed on the Connect website. Grades for these assignments can be checked on the Connect website and will NOT be added to Moodle. Remember, 13% is enough to move from an A to a B-.

## **Exams**

The exams will consist mostly of problem solving and short-answer conceptual questions.

### School of Business Mission Statement

The University of Montana's School of Business Administration is a collegial learning community dedicated to the teaching, exploration, and application of the knowledge and skills necessary to succeed in a competitive marketplace.

### School of Business Administration/Assessment and Assurance of Learning

As part of our assessment process and assurance-of-learning standards, the School of Business Administration has adopted the following learning goals for our undergraduate students:

Learning Goal 1: SoBA graduates will possess fundamental business knowledge.

Learning Goal 2: SoBA graduates will be able to integrate business knowledge.

Learning Goal 3: SoBA graduates will be effective communicators.

Learning Goal 4: SoBA graduates will possess problem solving skills.

Learning Goal 5: SoBA graduates will have an ethical awareness.

Learning Goal 6: SoBA graduates will be proficient users of technology.

Learning Goal 7: SoBA graduates will understand the global business environment in which they operate.

### Course Learning Goals

- Students should have an understanding of security pricing.
- Students should demonstrate necessary skills related to portfolio formation.
- Students should be knowledgeable about investment terminology.
- Students should be able to employ various concepts underlying the valuation of securities in a dynamic marketplace.

*The University of Montana assures equal access to instruction through collaboration between students with disabilities, instructors, and Disability Services for Students (DSS). If you think you may have a disability adversely affecting your academic performance, and you have not already registered with DSS, please contact DSS in Lommasson 154. I will work with you and DSS to provide an appropriate accommodation.*