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## FIN 420.01: Investments

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**Finance 420**  
**University of Montana**  
**School of Business Administration**  
**Syllabus, Fall Semester 2002**

**Professor:** Dr. Keith Jakob

**Course Title:** Investments

**Class Time:** Section 1- 8:10-9:30 TR, Section 2- 9:40-11:00 MWF

**Classroom:** GBB L11

**Office:** Gallagher Business Building 317     **Phone:** (406) 243-6159

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

**Web Page:** <http://www.business.umt.edu/faculty/kjakob/default.asp>

**Office Hours:** Tuesdays and Thursdays: 11:00 a.m. – 12:30 p.m. I will also be available by appointment

**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**

BADM 322 Business Finance

**Required Materials**

Text: Bodie, Z., Kane, A., Marcus, A., Essentials Of Investments, 4th ed., Irwin/McGraw-Hill, 2000.

Other: A good financial calculator is needed.

**Attendance**

While I will not take attendance, your attendance and participation are essential to an understanding of the course material. Most students who do not attend my class on a regular basis tend to earn much lower grades.

**Grading**

Final class grades will be based on the following:

Mutual Fund Questions/Report	100pts	(25%)
Midterm 1	100pts	(25%)
Midterm 2	100pts	(25%)
Final Exam	<u>100pts</u>	<u>(25%)</u>
	400pts	(100%)

Individual exams will not be assigned letter grades. The final grade will be determined by taking the total points earned as a percentage of the total possible (400).

### **Homework**

No graded textbook homework will be assigned, but weekly reading and practice exercises will need to be done in order to do well on exams. Come prepared to discuss chapter assignments each week and to work assigned problems in class. Students who do not complete the homework on a regular basis tend to earn much lower grades.

### **Mutual Fund Project**

A multi-part assignment for this course will involve the CRSP Mutual Fund Database with a written report due at the end of the semester. In addition to the written report there are 16 questions that are due throughout the semester. (See Project description and Class Schedule.)

### **Exams**

The exams will consist mostly of problem solving and short-answer conceptual questions. The final exam will be comprehensive.

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