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FIN 420.02: 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

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:

<table>
<thead>
<tr>
<th>Assessment</th>
<th>Points</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mutual Fund Questions/Report</td>
<td>100pts</td>
<td>(25%)</td>
</tr>
<tr>
<td>Midterm 1</td>
<td>100pts</td>
<td>(25%)</td>
</tr>
<tr>
<td>Midterm 2</td>
<td>100pts</td>
<td>(25%)</td>
</tr>
<tr>
<td>Final Exam</td>
<td>400pts</td>
<td>(100%)</td>
</tr>
</tbody>
</table>
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. An 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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