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### FIN 420.02: Investments

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**Finance 420**  
**University of Montana**  
**School of Business Administration**  
**Syllabus, Fall Semester 2003**

**Professor:** Dr. Keith Jakob

**Course Title:** Investments

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

**Classroom:** GBB 119

**Office:** GBB 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, 5th ed., Irwin/McGraw-Hill, 2004.

Other: A good financial calculator is needed. I will use TI BA II Plus from BADM 322.

**Attendance**

I will take attendance at random intervals throughout the semester. The attendance record will determine the curve you receive for the overall class grade. As an example, if you are present on 50% of the days when attendance is taken, you will receive 50% of the final curve. Your attendance and participation are essential to an understanding of the course material. 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	(10%)
Midterm 1	(30%)
Midterm 2	(30%)
Final Exam	<u>(30%)</u>
	(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. A final curve will be given at the discretion of the professor.

## **Textbook 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. Please bring your "Table Tent" to class so that I can call on you by your name. Students who do not complete the homework on a regular basis tend to earn much lower grades.

## **Mutual Fund Homework and Project**

A multi-part assignment for this course will involve the CRSP Mutual Fund Database with a small written report due at the end of the semester. In addition to the written report there are 20 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.

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