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Fall 9-1-2001

### FIN 301.01: Financial Statement Analysis

Keith Jakob

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**Finance 301**  
**University of Montana**  
**School of Business Administration**  
**Syllabus, Fall Semester 2001**

**Professor:** Dr. Keith Jakob

**Course Title:** Financial Statement Analysis

**Class Time:** Section 1- 9:10-10:00 MWF

**Classroom:** GBB L09

**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:** Mondays and Wednesdays: 1:30 p.m.- 3 p.m. I will also be available by appointment.

**Course Overview**

Finance 301 is designed to be a foundation course in the field of financial statement analysis for the undergraduate student. Upon completion of this course, students should have an understanding of the business activities of planning, financing, investing and operating. This course demonstrates popular tools and techniques in analyzing and interpreting financial statements.

**Course Prerequisites**

No Freshman/Sophomore students. BADM 322

**Required Materials**

Text: Wild, J., Bernstein, L., Subramanyam, K.R. Financial Statement Analysis, 7th ed., Irwin/McGraw-Hill, 2001.

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:

Industry Group Report	40pts	(10%)
Company Individual Report	60pts	(15%)
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 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. Most students who do not complete the homework on a regular basis tend to earn much lower grades.

### **Industry/Company Report**

You will be part of a group that will prepare and give a presentation on financial statement analysis for a selected industry group. You will also prepare an individual written analysis for the company of your choice within your industry group. (See Description)

### **Exams**

Examinations will test your understanding of the textbook readings, the lectures, and problems. The exams will consist mostly of problem solving and short-answer conceptual questions.

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**Course Schedule (Tentative- Dates and assignments subject to change)**

WEEK	DATE	CHAPTER	TOPIC	READING	HOMEWORK
1	9/5		Introduction		
	9/7	1	Overview	1-56	E. 3-10,12,13,16
2	9/10		“ ”		
	9/12		“ ”		
	9/14		“ ”		
3	9/16	2	Reporting	78-149	E. 2-5,7-9,12
	9/19		“ ”		P. 12(a,b),13,14
	9/21		“ ”		
4	9/24		“ ”		
	9/26	8	Return on Investment	578-602	E. 1,8,9,10 P. 6 use
	9/28		“ ”		(EBIT profit margin)
5	10/1		“ ”		
	10/3		“ ”		
	10/5		<b>EXAM 1</b>		
6	10/8		Discuss Exam		
	10/10	9	Profitability	618-644	E. 3,7
	10/12		“ ”		P. 3,4
7	10/15		“ ”		
	10/17		“ ”		
	10/19	10	Prospective Anal.	662-680	E. 1,2,3
8	10/22		“ ”		
	10/24		“ ”		
	10/26		“ ”		
9	10/29		“ ”		
	10/31	11	Credit Analysis	690-753	E.5,6,9
	11/2		“ ”		
10	11/5		“ ”		
	11/7		“ ”		
	11/9		<b>EXAM 2</b>		
11	11/12		<b>HOLIDAY</b>		
	11/14		Discuss Exam		
	11/16	12	Equity Analysis	790-825	E. 2,7
12	11/19		“ ”		P. 4
	11/21		<b>HOLIDAY</b>		
	11/23		<b>NO CLASS</b>		
13	11/26		“ ”		
	11/28		“ ”		
	11/30		“ ”		
14	12/3		“ ”		
	12/5		“ ”		
	12/7		Class Presentations		
15	12/10		Class Presentations		
	12/12		Class Presentations		<u>Individual</u>
					<u>Report Due</u>
	12/14		Review		
16	12/18		<b>FINAL EXAM</b>		
			<b>8:00-10:00 AM</b>		