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FIN 420.01: Investments

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Finance 420
University of Montana
School of Business Administration
Syllabus, Fall Semester 2001

Professor: Dr. Keith Jakob

Course Title: Investments

Class Time: Section 1- 10:10-11:00 MWF, Section 2- 11:10-12:00 MWF

Classroom: GBB L13

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.- 3:00 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 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 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.

Mutual Fund Project

One assignment for this course will involve the CRSP Mutual Fund Database with a written report due at the end of the semester.

Exams

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

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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	Background	1-20	6,7,10,11,12,14
2	9/10		“ ”		
	9/12	2	Financial Markets	24-56	2,6,7,10,11,14,16
	9/14		“ ”		
3	9/16		“ ”		
	9/19	3	Trading Securities	61-92	1,2,5,6,7,13,19
	9/21		“ ”		
4	9/24		“ ”		
	9/26	4	Mutual Funds	98-120	2,3,4,5,12,20
	9/28		“ ”		
5	10/1	5	Investors	124-144	1,2,3,4,5,6
	10/3		“ ”		
	10/5		EXAM 1		
6	10/8		Discuss Exam		
	10/10	6	Risk and Return	151-179	1,2,5,7,8,11,12
	10/12		“ ”		
7	10/15		“ ”		
	10/17		“ ”		
	10/19	7	Diversification	185-214	1,2,3,4,16,17,
8	10/22		“ ”		
	10/24		“ ”		
	10/26		“ ”		
9	10/29		“ ”		
	10/31	8	CAPM and APT	227-260	1,3,4,5,6,8,10,14,15,17
	11/2		“ ”		
10	11/5		“ ”		
	11/7	9	EMH	268-291	2,5,6,7,8,9,11,14,16
	11/9		EXAM 2		
11	11/12		HOLIDAY		
	11/14		EMH continued		
	11/16		“ ”		
12	11/19	13	Equity Valuation	408-434	1,2,3,10,11,13,
	11/21		HOLIDAY		
	11/23		NO CLASS		
13	11/26		Valuation Continued		
	11/28		“ ”		
	11/30	16	Options	501-531	1,2,3,4,5,6,7
14	12/3		“ ”		
	12/5		“ ”		
	12/7	17	Option Valuation	541-567	2,3,5,6,11,12,13
15	12/10		“ ”		
	12/12		“ ”		
	12/14		Review		
16	12/19		FINAL EXAM	Sec. 1	8:00-10:00 AM
	12/20		FINAL EXAM	Sec. 2	8:00-10:00 AM