

Chaminade University
MBA Program
Investment Management, MBA754, Online

Course Schedule

Quarter:	Fall 2013
Meeting days and times:	Sundays from 5:00PM – 6:00PM
Course location:	Online: Virtual Classroom. You are encouraged to attend our virtual class meeting using Elluminate Live within the eCollege system every Sunday from 05:00PM to 06:00PM Hawaii Standard Time. The lectures will be recorded for your asynchronous viewing.

Instructor Contact Information

Course Instructor:	Gholam Khaleghi, PhD
Office:	(Online)
Phone:	808-440-4280
E-Mail:	gkhaleghi@gmail.com
Administrative Assistant Phone:	808-440-4280

Course Description

This course provides a comprehensive overview of investment management and the analytic tools necessary to evaluate investment opportunities. Topics include analysis and valuation of equity securities, fixed income securities and financial derivatives, measurement of risk and return, construction of optimal asset portfolios, and criteria for evaluation of investment performance and portfolio selection and portfolio theory. Emphasis will be placed on writing, problem-solving, critical thinking and abstract reasoning.

Prerequisite: [MBA 510](#) and [MBA 611](#)

Course Learning Outcomes

Upon successful completion of this course, students should be able to:

1. Demonstrate knowledge of the mechanism of investment markets.
2. Understand how markets value securities.
3. Examine the concept of present value, the procedures for calculation present value, and the use of present value in determining whether an investment is satisfactory.
4. Explain the investment appeal of common stocks and why individuals like to invest in them.

5. Demonstrate knowledge of the role that a company's future plays in the stock valuation process and develop a forecast of a stock's expected cash flow.
6. Examine the basic investment attributes of bonds and the appeal they hold as investment vehicles.
7. Analyze the basic nature of the options in general and puts and calls in particular, and understand how these investment vehicles work.
8. Perform market research and security valuation.
9. Apply portfolio theory to the creation of an efficient portfolio.
10. Evaluate portfolio performance.
11. Manage a portfolio given specific risk parameters.

Course Schedule and Topics

Week 01 Oct. 07 – Oct. 14	Review of the Syllabus and Principles of Investments The Investment Environment
Week 02 Oct. 15 – Oct. 21	Financial Markets and Transactions
Week 03 Oct. 22 – Oct. 28	Investment Information and Securities Transactions
Week 04 Oct. 29 – Nov. 04	Investment Return and Risk
Week 05 Nov. 05 – Nov. 11	Modern Portfolio Concepts and Planning
Week 06 Nov. 12 – Nov. 18	Common Stock Investments
Week 07 Nov. 19 – Nov. 25	Analyzing Common Stocks
Week 08 Nov. 26 – Dec. 02	Common Stock Valuation
Week 09 Dec. 03 – Dec. 09	Technical Analysis, Market Efficiency, & Behavioral Finance
Week 10 Dec. 10 – Dec. 16	Analysis of Fixed-Income Securities

***Subject to change.**

1. Required Homework:

The main reason for the weekly homework assignments is to prepare you for the actual chapter quizzes that you are taking. Therefore, I tried to have more questions in the homework assignments to prepare you better for the quizzes.

Each weekly homework set is available on Tuesday, 12:30am through the following Monday at 11:50pm (Hawaii Standard Time).

The score of one homework assignment will be dropped because you may not be able to finish within the given time period or run to technical problems or just not happy with the results.

Thus, late submission, reset, retake, makeup of homework assignments will not be accepted: No Exception.

There are 10 homework assignments but students will be graded based on the 8 homework assignments with the highest scores. Each homework set worth 10 points: a total of 80 points.

The score of each homework assignment will be scaled as follows:

A homework set score > 89%, the student will earn 10 points.

A homework set score > 79%, the student will earn 8 points.

A homework set score > 69%, the student will earn 7 points.

A homework set score > 59%, the student will earn 6 points.

A homework set score > 49%, the student will earn 5 points.

The correct answers to your homework will be posted within 24 hours after the due date of each assignment.

2. Quizzes:

There are 10 quizzes and you have 30 minutes to complete each quiz containing 20 questions (one point each). Only 8 quizzes with the highest scores will be counted, a total possible point of 160. Thus, if you run to any problem or with one, two quizzes, consider them as your lowest quiz scores which have no effect in your final grade. **The correct answers to the quizzes will appear on the test page of the eCollege within 24 hours after the due date of any of the quizzes.**

Each quiz is available on Tuesday at 12:30am through the following Monday, 11:00am (Hawaii Standard Time).

Pre Quiz Information

- You will only be able to enter your online Quiz one time. No retake, No makeup, No reset.
- Click the "Save Answers" button often.
- If you lose your internet connection during your Quiz, logon again and try to access your Quiz. If you are unable to enter the Quiz contact eCollege Tech support and consider this quiz as one of your lowest Quiz scores.

- You will always be able to see the time remaining in any of the Quizzes at the top right of the page.

Submitting Your Quiz:

- When you are finished with the Quiz, click on the 'Submit for Grade' button.
- **Please note: Once you click the "Submit for Grade" button, you will NOT be able to edit or change any of your answers**

Assessments with Multiple Pages:

- Make sure you click the "Save Answers" button before advancing to the next page (we also suggest clicking on save answers while you are working).
- Complete all of the pages before submitting your Quiz for instructor review.
- Do NOT use your browser's 'Back' and 'Forward' buttons during the Quiz.
- Please use the provided links for navigation

Netscape Users:

- **Do NOT resize your screen/browser while you are in the Quiz. In other words, set the desired size of your window before entering the Quiz. You will lose your answers if you do so during the Quiz.**

When you take the quiz, remember to save each answer. Since all the quizzes are based on multiple-choice questions, after each question you will find five possible answers. Click on the radio button (circle) next to the best answer, then under the question click on the Save answer button.

Please make sure that you are absolutely ready to take any of the tests within the specified time period. Your computer must be in excellent working condition. Do NOT use wireless connection as it tends to disconnect from time to time. Once you start a quiz there is no turning back and it is beyond my control and I can NOT change any thing once you start a test and there is no makeup, reset, and retake of any quizzes: NO Exception.

NOTE: If for any reasons you cannot complete any of the activities and/or run to problems, consider that one as one of your lowest score which will be dropped and take the optional quizzes.

3. Online Discussion:

There are a total of 8 discussion articles (6 required and 1 optional). Only 6 of them with the highest scores will be counted. 10 points each, a total possible point of 60. Thus, if you run to any problem or with one or two weekly discussion articles (no effect on your final grade), consider them as your lowest scores.

All the weekly discussion assignments are located on each Weekly Module with their due dates. Usually, you'll have one discussion article with questions to answer and/or comments to post on **Doc.Sharing located on the top menu bar.**

I will facilitate the course discussion every week by posting videos clips, articles and/or discussion questions.

You will be graded based on your weekly answers and comments. The purpose of the discussion is to promote and encourage the exchange of ideas among students. **Each article is available Tuesday, 12:30am through the following Monday, 11:00am (Hawaii Standard Time). You will be receiving feedback within 48 hours after the due date.**

Make sure that your comments contribute to the class discussion. Your comment or response to your classmates will be evaluated based on the quality of arguments used in it. "I agree", "Cool stuff!" remarks are not considered valuable contribution to the discussion and will not be graded. You can certainly cheer your classmates but do not expect to receive any points for participation based solely on those "Way to go!" type postings.

When you post messages online, follow the basic principles of netiquette - rules for communicating online. [Click on this link to read more about those.](#)

As your instructor, I'll be facilitating course discussion. I'll post discussion questions, answer any of your questions, and comment on some but not every message posted on the discussion board. The purpose of the discussion is to promote and encourage the exchange of ideas between students.

Readings and Materials

A. TEXTBOOK: Series of Handouts are posted on eCollege.

Assignments and Participation

You are encouraged to attend our virtual class meeting using Elluminate Live within the eCollege system every Sunday from 05:00PM to 06:00PM Hawaii Standard Time. The lectures will be recorded for your asynchronous viewing.

Assessment and Grading

Grades of incomplete will not be given. Makeup exams will be permitted only in case of extenuating circumstances. Quizzes and exams will be problems, multiple choice, and/or short essay.

Grading System

	Total Possible Points	Your Points
Homework	10	1. _____
	10	2. _____
	10	3. _____
	10	4. _____
	10	5. _____
	10	6. _____
	10	7. _____
	10	8. _____
Total Possible Points for Homework ==>	80	
Weekly Discussion	10	1. _____
	10	2. _____
	10	3. _____
	10	4. _____
	10	5. _____
	10	6. _____
Total Possible Points for Discussion ==>	60	
Quizzes	20	1. _____
	20	2. _____
	20	3. _____
	20	4. _____
	20	5. _____
	20	6. _____
	20	7. _____
	20	8. _____
Total Possible Points for Quizzes ==>	160	
Total Possible Points for All Activities ==>	300	

Final grades will be based on the total points accumulated.

270≥A; 240≥B; 210≥C; 180≥D; 180< F.

Academic Honesty

Students are responsible for promoting academic honesty at Chaminade by not participating in any act of dishonesty and by reporting any incidence of dishonesty to an instructor or to a University official. Academic dishonesty may include theft of records or examinations, alteration of grades, and plagiarism. Questions of academic dishonesty in a particular class are first reviewed by the instructor who must make a report with recommendations to the Business School Dean. Consequences for academic dishonesty may range from an “F” grade for the work in question to an “F” grade for the course to suspension or dismissal from the University.

Students with Disabilities

Chaminade University provides reasonable accommodations for individuals with a disability in compliance with the Americans with Disabilities Act (ADA) of 1990. If you would like to know if you qualify for ADA accommodations, please contact our Counseling Center at 808-735-4845. Current appropriate documentation will be required for determination of accommodation eligibility.

Characteristics of a Marianist Education

The following are characteristics of the approach to education engaged at Marianist schools, including Chaminade University:

- Educate for formation in faith
- Provide an integral quality education
- Educate in family spirit
- Educate for service, justice and peace
- Educate for adaptation and change

Instructor Background Information

My name is Gholam Khaleghi. I earned my undergraduate degree in Economics and Mathematics from Worcester State College in Massachusetts and graduate degree in Applied Economics from the University of Hawaii-Manoa. Then, I moved back to Massachusetts to continue my education and research at Harvard University where I earned my post graduate degree while working on quantitative financial forecasting. For many years, I have worked as a business, economic, & financial consultant and lecturer in the areas of business, economic, financial, and leadership in 8 countries in the Asia/Pacific region and Europe.

Syllabus Modification

This syllabus is only a plan. The instructor may modify the plan during the course. The requirements of the course may be altered from those appearing in the syllabus. Further, the plan contains criteria by which the student's progress and performance in the course will be measured. These criteria may also be changed.

Guidelines for Communication

All required communications for this online course are asynchronous. Please email me if you need help with any of the assigned chapters. I am available 24/7 in the four following ways to help you with this course:

A) You can email me (gkhaleghi@gmail.com) your questions and I will provide answers to them.

B) You can come to chat session via Internet. We will discuss your questions, clarify issues, and provide answers to your questions.

C) You can ask for a conference call via phone. I will call you to discuss problems you have with any of the assigned chapters.

D) You can make an appointment to meet with me at the Chaminade Campus.
Email: gkhaleghi@gmail.com

Always include MBA 754 in the subject line.

Remember that without others being able to see your facial expressions or hear your tone, some comments may be taken in a way you didn't intend. So be careful in wording your emails. Use of emoticons may be helpful in some cases.

Use standard fonts.

Special formatting such as centering, audio messages, tables, html, etc. should be avoided unless necessary to complete an assignment or other communication.

Discussion Groups:

Review discussion threads thoroughly before entering the discussion. Be respectful of others' ideas.

Read the comments of others thoroughly before entering your remarks.

Cooperate with group leaders in completing assigned tasks.

Be positive and constructive in group discussions.

Respond in a thoughtful and timely manner.

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Chat: Elluminate Live within the eCollege system every Sunday from 05:00PM to 06:00PM Hawaii Standard Time.

Introduce yourself to others in the chat session.

Be polite. Choose words carefully. Do not use derogatory statements. Be concise in responding to others in the chat session.

Be constructive in your comments.

Library

Provide a link to the Chaminade library (www.chaminade.edu/library)

Technical Support

For technical questions contact the Chaminade eCollege help desk at helpdesk@chaminade.ecollege.com, or call toll free at 866-647-0654.

eCollege Account Support

For eCollege account support email jnakason@chaminade.edu or call 808-739-8327.

Course Website Address

<http://chaminade.ecollege.com>