

CHAMINADE UNIVERSITY OF HONOLULU
FIN 30340 - INVESTMENTS
FALL '98 Evening Session
Friday Evening, 1730-2140, Ft. Shafter Bldg. 320

Canceled

INSTRUCTOR: Randall Larsen, CPA
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OFFICE HOURS: By appointment

REQUIRED TEXT: Stanley B. Block and Geoffrey A. Hirt, Fundamentals of Investment Management, Fifth edition, New York, Irwin, 1996.

COURSE OBJECTIVES: To develop the student's ability to perform investment management through a variety of in-class learning activities, projects, and reading assignments. The topics to be covered include: Security Markets, Valuation of Securities, Technical Analysis and Market Efficiency, Bonds, Derivatives, International Securities Markets, Mutual Funds, Portfolio Management, Risk and Return, Capital Asset Pricing Model, Issues in Leveraged Buyouts. The course will also allow students to practice written and oral communications skills. Techniques for effective teamwork will also be practiced.

ATTENDANCE: On time attendance is required. Since this class meets only once per week, please do not miss more than one class. Please turn in any assignments due at the class missed by the following class. Please inform the instructor prior to an excused absence.

A weekly quiz counting toward the Chapter exam grade (20%) will be given sometime during each class meeting.

READING ASSIGNMENTS AND LEARNING ACTIVITIES: Personal Finance is not a spectator sport. Please come prepared each week to perform and discuss the subject matter assigned. Write down any questions raised by the learning activities. Keep a learning journal.

HOMEWORK: The midterm and final examinations will be based on material practiced in the homework problem sets. Students are encouraged to attempt the homework on their own and then to consult with a study group of classmates (in person, by telephone, or by email) before writing up their individual solutions. All homework will be graded for completion. Randomly selected assignments will be graded for accuracy of content, quality of presentation, and timeliness. Homework constitutes 10% of the individual's grade.

CHAPTER EXAMS: After each chapter is discussed in class, a chapter exam will be given covering the basic subject matter of the chapter. Please ask any questions prior to the exam.

CLASSROOM PARTICIPATION: Students are encourage to share their understanding of the subject matter of the course with fellow students. A variety of learning activities will allow students to demonstrate their understanding of personal finance.

MIDTERM and FINAL EXAMINATIONS: A midterm will test the student's understanding of the material taught in the first five weeks of the course. A comprehensive Final will be given touching on material covered throughout the course with an emphasis on material covered during the last 5 weeks.

INDIVIDUAL PRESENTATION: Each student will do an oral presentation of not less than 10 minutes or more than 15 minutes in duration. The subject of the presentation will be chosen by the student from a list of finance related topics. Some available topics will reflect current events. Other topics will deal with issues of continuing interest.

GRADING CRITERIA: Evaluated Material	Points	% value	Grading Scale
Homework	100	10%	A= 900-1000
Chapter Exams	200	20%	B= 800-899

Midterm Exam	250	25%	C=700-799
Individual Presentation	100	10%	D=600-699
Project	100	10%	
Final Examination	250	25%	F=0-599

CONSULTATION WITH INSTRUCTOR: Please schedule a meeting with the instructor if individual and group study efforts fail to make clear a major topic of the course. Consult a financial planning professional if you need specific financial planning information not covered by the course. If the student wishes to research a topic not covered by the course the instructor may direct the student to appropriate sources.

COMPUTER LITERACY: Computer literacy is helpful but not required. The instructor will point out useful internet sites and computer software.

PROJECT: Track a small portfolio of stock investments and calculate **portfolio** beta.

PROJECTED SCHEDULE: See attached schedule of learning activities and assignments.

Schedule

OCT 9 Introduction: Coverage of Chapters 1 & 2 inclass learning activities. Pr 1.1 to Pr. 1-4 Disc questions 2-1 to 2-20. Internet trading sites. Portfolio tracking assignment Explained.

OCT 16 Read Chapter 3 & 4. 3.1, 3.4, 3.7, 3.8, 3.11, 3.12 Discussion of Chapter 4.

OCT 23 ~~Read Chapter~~ 5 & 6 Pr. 6A,1

OCT 30 Read Chapter 7 Pr. 7.1, 2, 3, 4, 9, 12, 14 REVIEW.

NOV 6 Read Chapter 8 Pr. 8.1,3,4.,6,9,11 REVIEW

Nov 13 MIDTERM Covers Chapters 1-8

NOV 20 Read Chapter 9 and Chapter 10 Student Presentations

NOV 27 Read Chapter 11 and Chapter 12 Student Presentations. Pr 11-1 ,3,4,5,6
Pr 12-1, 3, 5, 11,13

DEC 4 Read Chapter 13, Chapter 14, Chapter 15 Portfolio Beta PROJECT DUE; REVIEW

DEC 11 Read Chapters 17, 18, 22 FINAL Comprehensive emphasis on Chapters 9-15