

CHAMINADE UNIVERSITY

COURSE SYLLABUS

COURSE TITLE: Finance 303, Investments
TERM: January 12, 1998 - May 1, 1998
TIMES: Tuesday and Thursday, 9:30 - 10:50
PLACE: Henry Hall 107

INSTRUCTOR: Caryn Callahan, Ph.D.
OFFICE HOURS: By Appointment
OFFICE PHONE: 739-4689 (Kieffer Hall, Number 4)
HOME PHONE: 395-0541
HOME E-MAIL: WORLD@LAVA.NET

COURSE DESCRIPTION

This is an introductory course covering material essential to a comprehensive understanding of investment management. Topics will include, but not be limited to, security markets, sources of investment information, analysis and valuation of equity securities, and issues in **efficient** markets.

OBJECTIVES

The main objectives of this course are to:

- Provide the student with a basic understanding of investment theory, concepts and procedures.
- 2) Provide a background for more informed investment decision making.
- 3) Prepare the student for further study in the field of investment and finance.

GRADING

Midterm Examination	25%
Final Examination	25
12 Weekly Quizzes and Homework	50

ASSIGNMENTS

Reading assignments will be taken from the assigned textbook and, **occasionally**, from supplementary material.

TEXTBOOK

Fundamentals of Investment Management, Geoffrey Hirt and Stanley Block, Irwin, Fifth Edition, 1996. Please read assigned sections before class.

**1998 SCHEDULE AND ASSIGNMENTS
FINANCE 303, INVESTMENTS**

WEEK 1

Tuesday, January 13 and Thursday, January 15

Sessions #1 and #2

Week 1 Assignment: **Textbook, Chapters 1 and 2**
 "The Investment Setting"
 "Security Markets: Present and Future"

WEEK 2

Tuesday, January 20 and Thursday, January 22

Sessions #3 and #4

Week 2 Assignment: **Textbook, Chapters 3 and 5 (Skip 4)**
 "Participating in the Market"
 "Economic Activity"

Thursday, January 22 Quiz on Chapters 1 and 2 (Quiz 1)

WEEK 3

Tuesday, January 27 and Thursday, January 29

Sessions #5 and #6

Thursday, January 29: Quiz on Chapters 3 and 5 (Quiz 2)

Week 3 Assignment: **Textbook, Chapters 6 and 7**
 "Industry Analysis"
 "Valuation of the Individual Firm"

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WEEK 4

Tuesday, February 3 and Thursday, February 5

Sessions #7 and #8

Thursday, February 5: Quiz on Chapters 6 and 7 (Quiz 3)

Week 4 Assignment: **Textbook, Chapters 8 and 9**
 "Financial Statement Analysis"
 "A Basic View of Technical Analysis"

WEEK 5

Tuesday, February 10 and Thursday, February 12
Sessions #9 and #10

Thursday, February 12: Quiz on Chapters 8 and 9 (Quiz 4)

Week 5 Assignment: Textbook, Chapters 10 and 11
"Investments in Special Situations"
"Bonds and Fixed-Income Fundamentals"

WEEK 6

Tuesday, February 17 and Thursday, February 19
Sessions #11 and #12

Thursday, February 19: **Quiz on Chapters 10 and 11 (Quiz 5)**

Week 6 Assignment: Textbook, Chapter 12
"Principles of Bond Valuation and Investment"

WEEK 7

Tuesday, February 24 and Thursday, February 26
Sessions #13 and #14

Thursday, February 26: Quiz on Chapter 12 (Quiz 6)

Week 7 Assignment: Review for Midterm

WEEK 8

Tuesday, March 3 and Thursday, March 5
Sessions #15 and #16

TUESDAY, MARCH 3: MIDTERM EXAMINATION
(Covers Chapters 1 through 12)

Week 8 Assignment: Textbook, Chapter 13
"Duration and Reinvestment Concepts"

WEEK 9

Tuesday, March 10 and Thursday, March 12

Sessions #17 and #18

Thursday, March 12: Quiz on Chapters 13 (Quiz 7)

Week 9 Assignment: Textbook, Chapter 14
"Convertible Securities and Warrants"

WEEK 10

Tuesday, March 17 and **Thursday, March 19**

Thursday, March 19: Quiz on Chapter 14 (Quiz 8)

Week 10 **Assignment:** Textbook, Chapters 15
"Put and Call Options"

WEEK OF MARCH 23 - MARCH 27
NO CLASS: SPRING BREAK

WEEK 11

Tuesday, March 31 and Thursday, April 2

Sessions #21 and #22

Thursday, **April 2:** Quiz on Chapter 15 (Quiz 9)

Week 11 Assignment: Textbook, Chapter 16
"Commodities and Financial Futures"

WEEK 12

Tuesday, **April 7** and Thursday, April 9

Sessions #23 and #24

Thursday, April 9: Quiz on Chapter 16 (Quiz 10)

Week 12 Assignment: Textbook, Chapters 17 and 18
"Stock Index Futures and Options"
"International Securities Markets"

WEEK 13

Tuesday, April 14 and **Thursday**, April 16
Sessions #25 and #26

Thursday, April 16: Quiz on Chapters 17 and **18(Quiz 11)**

Week 13 Assignment: **Textbook**, Chapter 19 and 20
"Mutual Funds"
"Investments in Real Assets"

WEEK 14

Tuesday, April 21 and Thursday, April 23
Sessions #27 and #28

Thursday, April 23: Quiz on Chapters 19 and 20 (Quiz 12)

Week 14 Assignment: Textbook, Chapter 21
"A Basic Look at Portfolio Management"

WEEK 14

Tuesday, April 28 and Thursday, April 30
Sessions #29 and #30

Thursday, April 28: Quiz on Chapters 21 (Quiz 13)

Week 14 Assignment: **Textbook**, Chapter 22
"Measuring Risks and Returns"

REVIEW FOR FINAL

FINAL EXAM

MONDAY, May 5: 8:00 - **10:00** A.M. ?

FINAL EXAM WILL COVER CHAPTERS STUDIED **SINCE THE MIDTERM**
