

# CHAMINADE UNIVERSITY

## COURSE SYLLABUS

**COURSE TITLE:** Finance 30350, Investments

**TERM:** Spring Evening, April 6, 1998 - Jun. 15, 1998

**CLASS TIME:** Mondays, 1730 - 2140

**PLACE:** Barbers Point NAS

**INSTRUCTOR:** Rizalino "Lino" Vicente, MBA

**OFFICE HOURS:** By Appointment

**PHONE:** Office: 526-6924 (Paine Webber)

**TEXT:** Fundamentals of Investment Management Geoffrey A. Hirt and Stanley B. Block, Fifth Edition.

### COURSE DESCRIPTION

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

### **OBJECTIVES**

The main objective of this course are to:

- 1) Provide the students 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**

A	90 - 100	Mid-term Exam	25%
B	80 - 89	Final Exam	25%
C	70 - 79	5 Quizzes	25%
D	60 - 69	Homework & Class Participation	25%
F	Below 60		
TOTAL			100%

## **ASSIGNMENTS**

Reading assignments **will** be taken from the assigned textbook and, occasionally, from supplementary material. Sample problems at the end of each chapter will be discussed as part of each week's assignment. Case study report will supplement reading assignments.

## **SUMMER SCHEDULE AND ASSIGNMENTS**

<b>DATE</b>	<b><u>TOPIC</u></b>	<b><u>READING</u></b>
April 06	The Investment Setting/Security <b>Markets</b> : Present and Future.	Chapters 1-2
April 13	Participating in the Market/Economic Activity QUIZ #1 on Chapters 1 and 2.	Chapters 3&5
April 20	Industry Analysis/Valuation of the Individual <b>Firm</b> / Financial Statement Analysis; <b>QUIZ #2</b> on Chapters 3 and 5	Chapters 6-8
April 27	A Basic View of Technical Analysis and Market Efficiency/ Investments in Special Situations; QUIZ #3 on Chapters 6-8.	Chapters 9-10
May 04	Bonds and Fixed-Income Fundamentals/Principles of Bond Chptrs. 11-12 Valuation and Investment; Mid-Term REVIEW.	
May 11	Duration and Reinvestment Concepts; <b>Mid-Term EXAM</b>	Chapter 13
May 18	Convertible Securities and Warrants/Put and Call Options; <b>Mid-Term</b> Exam discussion.	Chptrs. 14-15
May 25	Commodities and Financial Futures/Stock Index Futures and <b>Options/International</b> Securities Markets; <b>QUIZ #4</b> on Chapters 13-15.	Chptrs. 16-18
June 01	Mutual Funds/Investments in Real Assets QUIZ #5 on Chapters 16-18.	Chptrs. 19-20
June 08	A Basic Look at Portfolio Management and Capital Market Chptrs. 21-22 Theory/Measuring Risks and Returns <b>of Portfolio</b> Managers. Final Exam <b>REVIEW</b> .	
June 15	Case <b>Reports/FINAL EXAM</b>	