COURSE DESCRIPTION

The course content consists of a mix of descriptive material, theoretical models, model application, and group projects. We shall cover fundamental analysis and security valuation on stocks, bonds, options and futures, as well as modern portfolio management. On completion, students should be conversant in investment management in preparation for careers in financial analysis and financial planning, investment banking, and corporate finance.

COURSE PRE-REQUISITES

Finance (FNA2004)
Statistics (BZ1008/ST1131A)

REQUIRED COURSE MATERIALS

(1) *Textbook: Investments, 7th or 8th edition*
   by Bodie, Kane, and Marcus

(2) *Financial Calculator:* You are required to bring calculator every class. You are also expected to be familiar with Microsoft Excel, with which more sophisticated statistical analysis and computation can be performed.

COURSE EVALUATION

The assessment policy for this course is specified in the following paragraphs. Please read it carefully. The final course grade will be computed based on the following weights:

(1) Class Participation/Tutorial: 15%
(2) Midterm Test: 25%
(3) Group Readings: 15%
(4) Group Project (Written Report and Presentation): 20%
(5) Final Test: 25%