

Professor

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Learning Outcomes

Upon completion of this course students will be able to

- Design Investment policies and portfolios for individual and institutional investors
- Perform comprehensive financial analysis and valuation of common stocks
- Build and analyze financial models in Excel
- Apply bond valuation techniques using yield curve and credit analysis
- Evaluate investment portfolios performance based on asset allocation and security selection

Course Schedule

| 2020 Week of: | | | |
|------------------|----|---|---|
| | | Wednesday, September 9 First Day of Classes Monday, October 12 Statutory Holiday Wednesday, November 11 Statutory Holiday | |
| Sep | 9 | Introduction Investment Policy Statement for Individual and Institutional Investors | |
| | 14 | Managing Investment Portfolio for Individual and Institutional Investors Industry Ethics. CFA Code of Ethics and Standards of Professional Conduct | Ch. 2 |
| | 21 | Portfolio Management: Active vs Passive, Style Analysis Risk-Adjusted Return Analysis Performance Measurement and Attribution | Ch. 11, 18 |
| | 28 | Bonds Review of Duration and Convexity Credit Analysis Bond Portfolio Strategies | Ch. 12, 13 |
| Oct | 5 | Real Estate Analysis and Valuation | |
| | 12 | Common Stock Analysis Review of Strategy and Financial Statements Analysis Economic Indicators and Industry Analysis | Ch. 8, 9 Koller: Chapters 6, 9, 10 |
| | 19 | Common Stock Analysis Forecasting, Earnings Quality Deriving Free Cash Flows Enterprise Value | Koller: Chapter 11 |
| | 26 | Common Stock Analysis - Relative Valuation using Multiples | Ch. 9, 10 Koller: Chapter 16 |

SKILLS ACROSS THE BUSINESS CURRICULUM

The Okanagan School of Business promotes core skills across the curriculum. These skills include reading, written and oral communications, computers, small business, and academic standards of ethics, honesty and integrity.

STUDENT CONDUCT AND ACADEMIC HONESTY

What is the Disruption of Instructional Activities?

examinations, lectures, seminars, tutorials, group meetings, other related activities, and with students using the study for disruption of instructional activities include a range of sanctions from a warning and/or a failing grade on an assignment, examination or course to suspension from OC.

What is Cheating?

use is made of books, notes, diagrams or other aids excluding those authorized by the examiner. It includes communicating with others for the purpose of obtaining information, copying from the work of others and purposely exposing or conveying information to other students who are taking the test or ex

Students must submit independently written work. Students may not write joint or collaborative assignments with other students unless the instructor approves it in advance as a group/team project. Students who share their work with other students are equally involved in cheating.

What is Plagiarism?

uding words, ideas and media, without permission for course credit towards a certificate, diploma, degree and/or professional designation. The defining characteristic is that the work is not yours.