



**Professor**

<i>Elena Mitropolsky, Course Captain</i>	C143	emitropolsky@okanagan.bc.ca
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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
- Analyze alternative asset classes such as real estate and private equities

**Evaluation Procedure**

Investment Practice	20%
Term work (assignments)	20%
Group Project	30%
Final Exam	30%
Total	100%

**Notes**

Classes are Tue/Thu 3:30 – 4:50pm in B112

In order to pass this course, the student must obtain 50% or higher on the final exam. There will be no make-up or supplementary exams. Class attendance is very important, and active class participation/contributions are expected. There will be in-class assignments performed in Excel.

**StockTrak Investment Practice**

Each student will need to register an individual account at:

<https://www.stocktrak.com:443/members/register?session=Buad4502021>

You are a portfolio manager working for a client – the clients be assigned in the first week of classes. Based on your clients needs, you will develop an investment policy statement, and then run a portfolio for your client in StockTrak. Be prepared to discuss your portfolio on a weekly basis. You can trade common stocks, bonds, and options, and you may trade on

margin and short-sell, based on your clients needs and if so desired. Your work will be evaluated base



