

Investment Analysis

Course Title	Investment Analysis		
Course Code	FIN420	Course Type	Finance Specialization
Credit	3	Contact Hours	45
Prerequisites	None	Co-Requisites	None
Duration	15 weeks	Class Type	Lecture

SolBridge GACCS Objectives	%	Learning Objectives
1. Global Perspective	50	1. Define investment, participants in the investment process and types of investors.
2. Asian Expertise	20	2. Explain the difference between investing in common stock and investing in fixed-income securities.
3. Creative Management Mind	20	3. Describe the characteristics of mutual funds, unit trusts and hedge funds
4. Cross Cultural Communication	0	4. Calculate and interpret the risk and return on an investment
5. Social Responsibility	10	5. Analyze the suitability of an investment by discounting its cash flows
		6. Explain the idea of random walks and efficient markets, and note the challenges these theories hold for the stock valuation process.

Course Description

This course focuses on the concepts of portfolio analysis in the general area of institutional investment management. The course discusses principles for managing investment assets that include equity and fixed-income securities. These principles can be used on corporate investment management, bank-administered trusts, and other institutional investment management.

Learning and Teaching Structure

The following methods and forms of study will be used in the course: Lectures, class discussions, in-class case studies, working in small teams and home reading

Assessment	%	Text and Materials
Attendance	20	Title: Fundamentals of Investing
Homework Exercises and Assignment	15	Edition: 12th edition
Midterm Examination	25	Author(s): Scott Smart, Lawrence Gitman and Michael Joehnk
Final Examination	40	Publisher: Pearson ISBN: 9780133075359

Course content by Week

1	Course outline and overview of the financial system
2	The investment environment
3	The securities markets and transactions
4	Investment information and securities transactions
5	Return and risk
6	Modern Portfolio Management
7	Midterm Examination
8	Investing in common stocks
9	Security regulation and investment ethics
10	Stock valuation
11	Technical analysis, market efficiency and behavioral finance
12	Mutual funds and other professionally managed portfolios
13	Options: Puts and Calls
14-15	Review and Final Examination