

GAME PLAN – INVESTMENTS * SPRING 2010 * MITCHELL HALL 209 * MWF 2:00-2:50 P.M.

The course schedule will approximately follow this game plan:

| Date | Topical Coverage | Assignment |
|--|---|---|
| <p>Week 1: Jan 11 – Jan 15</p> | <p>Introduction to Investments Chapter 1: The Investment Setting Also read the end-of-book appendixes, A – “How to Become a CFA Charterholder” (pg. 709) and B – “CFA Institute: The Code of Ethics and Standards of Professional Conduct” (pages 710-711).</p> | <p>Listen and participate. <i>Optional: You may wish to register for ThomsonOne (may have access code in cardboard shrink-wrapped with textbook, or purchase it online for \$29.95): http://tabsefin.swlearning.com/.</i> Read chapter, study calculation example. Access professor’s website: http://www.johnzietlow.com (then click on Investments). Start selecting your individual stock and also what stocks you will recommend for your group portfolio. Start on Ch. 1 homework problems to be written out but not turned in (see below).</p> |
| <p>Week 2: Jan 18 – Jan 22 <i>Note: No classes on MLK Day, Mon. 1/18</i></p> | <p>Chapter 2: The Investment Environment</p> | <p><i>Wed. 1/20 - Complete written out (pp. 21-22): Chap. 1: Problems 1 and 2—NOTE: On Problem 1, change wording to regarding the 7% that is given to read “nominal risk-free rate of return”;</i> Read chapter, study calculation examples. Start Chap. 2 homework problems (see below).</p> |
| <p>Week 3: Jan 25 – Jan 29</p> | <p>Chapter 3: Selecting Investments in a Global Market <i>Mon. 1/25: Invest @ market close!</i></p> | <p>Read chapter, answering concept questions as you go. Study calculation examples. <i>Mon. 1/25: Invest @ market close!</i> <i>Wed. 1/27 -Chap. 2: Problems 1-6, 8, 9, 11.</i></p> |
| <p>Week 4: Feb 1 – Feb 5 <i>Note: School of Business Chapel is Wed. 2/3 in Silk Auditorium.</i></p> | <p>Chap. 11: Valuation (<i>bring financial calculator</i>)</p> | <p>Read chapter. Study calculation examples. Bring financial calculator. <i>Wed. 2/3 - Chap. 3: Problems 2, 3, 6, 8, 9, 10; Turn in Spreadsheet #5.</i></p> |
| <p>Week 5: Feb 8 – Feb 12</p> | <p>Mon. 2/8 – Chapter 13: Economic and Industry Analysis <i>Wed. 2/10 - Regula Rm. 300 (PC Lab):</i> Library research “how-to” lab (Inflation Protection/Faith Integration Project) <i>Fri. 2/12 - Portfolio Group Meeting.</i></p> | <p><i>Mon. 2/8 - Chapter 11: Problems 3, 5-12. Study & prepare for exam.</i> <i>Wed. 2/10 - Go to Regula 300.</i> Take attendance at meeting, provide attendance to instructor on Monday.</p> |

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| Week 6: Feb. 15 – Feb. 19 | <p>Mon. – Review.</p> <p><i>Wed. 2/17 - Exam 1: Chaps. 1-3, 11.</i></p> <p>Fri.: Chapter 14: Analysis of Financial Statements</p> | <p>Mon.: Review; may start Chap. 14.</p> <p><i>Bring a calculator to exam. I will provide formulas cover sheet.</i></p> <p><i>Fri. 2/19 - Chap. 13: Problems 2, 3, 14, 15.</i></p> <p>Read chapter, study calculation examples.</p> |
| Week 7: Feb. 22 – Feb. 26 | <p>Mon. - Chap. 14, continued.</p> <p>Wed. & Fri. - Chapter 15: Company Analysis and Stock Valuation</p> | <p>----</p> <p><i>Wed. 2/24 - Chapter 14 Problems 1, 2, 3.</i></p> <p>Read chapter, study calculation examples.</p> |
| Week 8: Mar 1 – Mar 5 | <p><i>Mon. 3/1 & Wed. 3/3 – Meet with group on Portfolio and on inflation protection research.</i></p> <p>Fri. - <i>Chapter 16: Technical Analysis</i></p> | <p>Take attendance at group meeting; provide to instructor on Friday.</p> <p>Read chapter, study calculation examples.</p> |
| Mar 8 – Mar 12 | <i>SPRING BREAK</i> | <i>Relax and have a safe and enjoyable break!</i> |
| Week 9: Mar 15 – Mar 19 | <p>Mon. & Wed. - Chapter 6: Organization and Functioning of Securities Markets</p> <p>Fri. - Chapter 7: Securities Market Indexes</p> | <p>Read chapters, study calculation examples.</p> <p><i>Wed. 2/27 - Chapter 15 Problems 1-5.</i></p> <p>Read chapter, study calculation examples.</p> |
| Week 10: Mar 22 – Mar 25 | <p>Mon. - Chapter 4: Mutual Funds and other Managed Investments</p> <p><i>Wed. 3/24: Exam 2 - Chapters 13-15</i></p> <p>Fri. - Chapter 5: Investment Policy Statements and Asset Allocation Issues</p> | <p>Study & prepare for exam.</p> <p><i>Wed. 3/24 Exam: Bring calculator. I will provide cover sheet.</i></p> <p>Read chapter, study calculation examples.</p> |

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| <p>Week 11: Mar 29 – Apr 1 (M, W, and Th)</p> <p><i>Note: Rather than have a Friday class, we will meet at 2 on Thursday (same room) and then be off on Friday to commemorate Good Friday.</i></p> | <p>Chapter 8: Introduction to Portfolio Management</p> | <p>Read chapter, study calculation examples.</p> |
| <p>APR 2 – APR 5</p> | <p>EASTER BREAK</p> | <p>RELAX AND TAKE TIME TO WORSHIP!</p> |
| <p>Week 12: Wed 4/7 – Fri 4/9 <i>Note: No class on Monday.</i></p> | <p>Chapter 9: An Introduction to Asset Pricing Models</p> <p><i>Fri.</i> – Meet in groups to finish your work on inflation protection strategy/faith integration course project.</p> | <p>Read chapter, study calculation examples.</p> <p>Take attendance at group meeting; provide this to instructor on Monday.</p> |
| <p>Week 13: Apr 12 – Apr 16</p> <p><i>Note: Last day of trading for individual competition and for group portfolio competition is Friday, 4/16.</i></p> | <p>Chapter 10: Efficient Capital Markets</p> <p><i>Wed. 4/14</i>– Colleen Winney, Career Development Office – “Careers in Investments”</p> <p><i>Fri.</i> – Chap. 10, continued. <i>Fri. 4/16</i> - Turn in inflation protection strategy report. Include faith integration.</p> | <p>Read chapter, study calculation examples.</p> <p><i>Wed. 4/14</i> - Chapter 9: Question # 15; Problems 1, 2, 3, 13. Finish group inflation protection strategy/faith integration report. Work on group portfolio report.</p> <p><i>Fri. 4/16</i> - Turn in group inflation protection strategy report. Include faith integration.</p> |
| <p>Week 14: Apr 19 – Apr 23; & Mon 4/26 (Our last class is Monday, 4/26; Spring semester classes end Tuesday, Apr 27)</p> | <p>Mon. & Wed. - Chapter 12: Analysis of Fixed Income Securities Fri. & Mon. - Chapter 17: Introduction to Derivative Instruments</p> | <p>Read chapters, study calculation examples.</p> <p><i>Fri. 4/23</i> - Chapter 12 Questions # 6, 7; Problems # 1, 2, 3, 5, 7a; <i>Turn in Spreadsheet #4.</i> Finalize work on Portfolio Report – groups.</p> |
| <p><u>Final Exam:</u> <i>Monday, May 3, from 3:30 p.m. - 5:00 p.m.</i></p> | <p><u>Date & Time:</u> <i>Mon. 5/3, 3:30 P.M. – 5:00 P.M.</i></p> | <p><i>Chapters 4, 8, 9, 10 and 12. Bring financial calculator. ** Turn in group portfolio report at final exam. **</i></p> |