

**WILLIAM PATERSON UNIVERSITY
COTSAKOS COLLEGE OF BUSINESS
INVESTMENT ANALYSIS AND PLANNING
WINTER 2015**

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A. DESCRIPTION OF THE COURSE

Analysis of security markets, regulation, valuation of stocks and bonds, primary and secondary markets, trading, investment banking, ethics, theoretical analysis and practical applications of modern portfolio theory to individual and institutional portfolio management; optimal asset selection and allocation decisions, portfolio mix and the evaluation of portfolio performance; Markowitz diversification, capital market theory, capital asset pricing, arbitrage pricing, fixed income securities and option strategies.

B. READING MATERIALS FOR THE COURSE.

Bodie Kane and Marcus, Essentials of Investments, 9th ed., 2010 McGraw Hill
ISBN 978-0-078034695-1; 978-0-07-7502294

Handouts

C. STUDENT EVALUATION.

1.	First Test	25%
2.	second Test	25%
3.	third test	25%
6.	Final	25%

D. STRUCTURE OF TESTS

Tests are essays and problems

E PARTICIPATION

If you participate on blackboard you will receive extra credit.

G. PREREQUISITE COURSES

1. Mathematics 140
2. Economics 210
3. Finance 320

F CONTENTS

<u>WEEK</u>	<u>MATERIALS</u>	<u>TOPIC</u>
1	chs.1-3	Security Markets
2-3	Chs.5-7	Time Value of Money Risk&Return Diversification
First Test		
2-3	chs.10	Bond Valuation and Management
Second Test		
3-4	chs.13	Equity valuation
Third Test		
FINAL		