

**WILLIAM PATERSON UNIVERSITY
COTSAKOS COLLEGE OF BUSINESS
INVESTMENT ANALYSIS AND PLANNING FIN/FINP 4350
WINTER 2014**

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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.

1. BodieKane and Marcus, Essentials of Investments, 9th ed., 2010 McGraw Hill
ISBN 978-0-078034695-1; 978-0-07-7502294
2. Class Notes

Handouts

C. STUDENT EVALUATION.

1.	First Test	25%
4.	second Test	25%
5.	Participation	25%
6.	Final	25%

D. STRUCTURE OF TESTS

All tests are CUMULATIVE. If one misses taking a test he/she will receive a zero automatically.

E INSTRUCTIONAL PHILOSOPHY OF THE INSTRUCTOR

The professor believes to learn in Finance the students need to get involved actively. Thus, he will assign several problems inside and outside of class and he will do several. He will have you teach one another. He will ask you questions in class and ask you to present material that we have already analyzed. That means you will be asked to solve problems in class in front of your fellow students and temporarily be the teacher. At other times, he will lecture, or present the material interactively with your collaboration.

G. PREREQUISITE COURSES

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

F CONTENTS

WEEK	MATERIALS	TOPIC
1	chs.1-3	Security Markets
	Chs.5 and 7	Risk&Return, Diversification
First Test		
2	chs.12-13 chs. 10-11	Equity Analysis Bond Valuation and Management
Second Test		
3	ch. 18	Portfolio Management Techniques Performance evaluation
FINAL		