



Professor

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### Learning Outcomes

Upon completion of this course students will be able to

- formulate Investment Policy Statement and make asset allocation decisions for individual and institutional investors.
- apply the valuation theory to a range of investments.
- apply macro-analysis and micro-valuation of the stock market; conduct industry analysis, company analysis, and stock valuation.
- apply technical analysis in stock and bond valuation.
- formulate equity portfolio management strategies.
- formulate bond portfolio management strategies.
- evaluate equity and bond portfolios with various techniques.

### Course Objectives

This course will cover the following content:

\*See weekly schedule.



## Course Schedule

<b>Date</b>		<b>Topic</b>	<b>Textbook</b>
		Tues. Sept 8 College-wide Orientation Day Wed. Sept 9 Classes begin Mon. Oct 12 Thanksgiving Day – no classes Wed. Nov 11 Remembrance Day – no classes Thur. Dec 10 Last day of regularly scheduled classes	
Sept	11	Asset Allocation	Ch 2
	18	Analysis of Financial Statements	Ch 10
	25	An Introduction to Security Valuation	Ch 11



