Professor

Elena Mitropolsky, Course Captain	**C143**	**emitropolsky@okanagan.bc.ca**

Learning Outcomes

Upon completion of this course students will be able to

- Design Investment policies and portfolios for individual and institutional investors
- Perform comprehensive financial analysis and valuation of common stocks
- Build and analyze financial models in Excel
- Apply bond valuation techniques using yield curve and credit analysis
- Evaluate investment portfolios performance based on asset allocation and security selection
- Analyze alternative asset classes such as real estate and private equities

Evaluation Procedure

Investment Practice	20%
Term work (assignments)	20%
Group Project	30%
Final Exam	30%
Total	100%

Notes

Classes are Tue/Thu 3:30 4:50pm in B112

In order to pass this course, the student must obtain 50% or higher on the final exam. There will be no make-up or supplementary exams. Class attendance is very important, and active class participation/contributions are expected. There will be in-class assignments performed in Excel.

StockTrak Investment Practice

Each student will need to register an individual account at:

https://www.stocktrak.com:443/members/register?session=Buad4502021

You are a portfolio manager working for a client the clients be assigned in the first week of classes. Based on your clients needs, you will develop an investment policy statement, and then run a portfolio for your client in StockTrak. Be prepared to discuss your portfolio on a weekly basis. You can trade common stocks, bonds, and options, and you may trade on margin and short-sell, based on your clients needs and if so desired. Your work will be evaluated base