

**Finance 420**  
**University of Montana**  
**School of Business Administration**  
**Syllabus, Fall Semester 2008**

**Professor:** Dr. Keith Jakob

**Course Title:** Investments

**Class Time:** Section 1- 9:40-11:00 MW, Section 2- 11:10-12:30 MW

**Classroom:** GBB L-11

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**Email:** keith.jakob@business.umt.edu

**Web Page:** <http://www.business.umt.edu/Faculty/jakob/>

**Office Hours:** Monday and Wednesday: 12:30 p.m. – 2:00 p.m. I will also be available by appointment.

**Course Overview**

Finance 420 is designed to be a foundation course in the field of investment analysis for the undergraduate student. Upon completion of this course, students should have an understanding of security pricing, portfolio formation, investment terminology and various concepts underlying the valuation of securities in a dynamic marketplace.

**Course Prerequisites**

BADM 322 Business Finance

**Required Materials**

**Text:** Bodie, Z., Kane, A., Marcus, A., Essentials of Investments, 7th ed., Irwin/McGraw-Hill

**Homework Manager:** This comes with the new text when purchased at the bookstore.

**Calculator:** A financial calculator is needed. Only two models are acceptable. I will use the TI BA II Plus. You may also use the HP 10BII. No other device will be tolerated during exams. No other calculators, PDAs or cell phones!

**Attendance**

Your attendance and participation are essential to an understanding of the course material. Students who do not attend my class on a regular basis generally earn much lower grades. I expect to see you in this class. Please try to sit in the same spot for each session, and bring your table “name tag.” This will help me to get to know you.

## **Grading**

Final class grades will be based on the following:

Homework Manager Assignments	(15%)
Midterm 1	(27.5%)
Midterm 2	(27.5%)
Final Exam	<u>(30%)</u>
	(100%)

Individual exams will not be assigned letter grades. A final curve will be given at the discretion of the professor. Exam grades will be posted on Blackboard after each exam.

## **Textbook Homework**

Regular ungraded textbook homework will be assigned. The weekly reading and these exercises must be done in order to do well on exams. Come prepared to discuss chapter assignments each week and to work assigned problems in class. Students who do not complete the homework on a regular basis earn much lower grades.

## **Homework Manager**

Homework manager questions for this class are on:

<http://mh8.brownstone.net/classes/investments420/>

These homework problems are worth 15% of your overall grade. You can redo these assignments as many times as you would like before the due date. I will keep your best score for the assignment. The homework manager tool can change the numbers in the problem each time you re-attempt the assignment. The due dates for the assignments are listed on the homework manager site. Be sure to check if the times are listed on Eastern Time.

## **Exams**

The exams will consist mostly of problem solving and short-answer conceptual questions.

### *School of Business Administration/Mission Statement*

The faculty and staff of the School of Business Administration at The University of Montana – Missoula are committed to excellence in innovative experiential learning and professional growth through research and service.

### *School of Business Administration/Assessment and Assurance of Learning*

As part of our assessment process and assurance-of-learning standards, the School of Business Administration has adopted five learning goals for our undergraduate students:

- Learning Goal 1 – SoBA graduates will possess fundamental business knowledge/integrated business knowledge.
- Learning Goal 2 – SoBA graduates will demonstrate communication skills.
- Learning Goal 3 – SoBA graduates will possess problem solving skills/creative thinking skills.

- Learning Goal 4 – SoBA graduates will have an ethical awareness and demonstrate ethical decision making.
- Learning Goal 5 – SoBA graduates will demonstrate the use of technological skills for communication and problem solving.

Course Learning Goals

- Students should have an understanding of security pricing.
- Students should demonstrate necessary skills related to portfolio formation.
- Students should be knowledgeable about investment terminology.
- Students should be able to employ various concepts underlying the valuation of securities in a dynamic marketplace.