

FIN 3315 - INVESTMENT
DEPARTMENT OF ECONOMICS AND FINANCE
WOODY L. HUNT COLLEGE OF BUSINESS
THE UNIVERSITY OF TEXAS AT EL PASO

Instructor: Obed Nana Buadi

Office hours: TR 10:30 -11:30 AM or by appointment

Office: COBA 315

Class hours: TR 12:00 -1:20 PM

Email: onbuadi@miners.utep.edu

Classroom: BUSN 332

Course Prerequisite(s): FIN 3310

Course Description: This course is a comprehensive investment analysis and portfolio management study. The course introduces the theories of managing a portfolio of financial assets within the risk-return framework. The course covers the allocation process of different asset classes into efficient portfolios considering the investment criteria. In this course, various security analysis techniques and valuation models are discussed.

Learning Objectives: You will learn to understand how and when to apply different valuation techniques of financial analysis, demonstrated through your ability to:

- Compile, analyze, and interpret financial data related to the current investment environment for the market and publicly traded companies.
- Analyze, value, and make recommendations for various securities.
- Perform financial modeling to evaluate investments and risk.
- Using different techniques to manage and balance portfolios

Course Materials:

- **Required Text:** Essentials of Investments, 12th Edition Authors: Bodie, Kane, and Marcus. You can explore Purchase Options for the textbook here:
(<https://www.mheducation.com/highered/product/essentials-investments-bodie-kane/M9781260772166.html#buying-options>)
- A financial calculator is required for this class.



Course Requirements

This course will employ participation, projects, and exams as evaluation methods.

- Participation: Each student is expected to participate in class discussions.
- Project: There will be a group project for this class. These are typically more analytical to help you build those skills necessary for investment decisions. This will be detailed in class. The project, together with the final presentation total score will be 100 points and is worth 30% of the total score.
- Exams: There will be three in-class exams. The exams will be multiple-choice, with written questions and problems. Each exam will be worth 100 points and is worth 20% of the total score.

Grading

The semester grades will be based on the following:

Component	Weight
Class Attendance/Participation	10%
Project & Presentation	30%
Exam 1	20%
Exam 2	20%
Final Exam	20%
Total	100%

Grading Scale

Meaning	Percentage	Letter
Excellent	90% to 100%	A
Good	80% to < 90%	B
Average	70% to < 80%	C
Passing	60% to < 70%	D
Failure	< 60%	F

Policies

Grading Policy

I will not accept late assignments/homework, nor will I be allowed for make-up exams. Unless the situations are dire, with proof adhering to the University attendance policy below, these policies are strict. Adjustments in test grades will be made only within the week following the test; after one week, no grades will be changed for any reason.

You are responsible for monitoring your grades on all activities every week by checking your grades on the course website. If you fail to do so, and later in the semester or at the end of the semester, find an error in an earlier grade, it will not be corrected. You have one week from the time the grade for each activity is posted to the course website to check for errors or other problems with the grade. If you find an error or problem with your grade, you should bring it to my attention as soon as possible and then check your grades regularly to ensure that it has been corrected.

Technology Policy

Electronic devices are allowed during lectures unless otherwise stated. I will move about the room and if I notice that the technology is being used for something besides my course, I will ask you to stow the device.

Syllabus Change Policy

Except for changes that substantially affect the implementation of the grading statement, this syllabus is a guide for the course and is subject to change with advance notice.

Class Attendance Policy

Class attendance is, of course, encouraged. However, attendance is not required and is actively discouraged for purposes other than listening to the class presentation, asking questions, and participating in organized discussion and learning activities. Discourteous, uncivil, or disruptive behavior is unacceptable.

University Attendance Policy

Excused absences include documented illness, deaths in the family and other documented crises, call to active military duty or jury duty, religious holy days, and official University activities. These absences will be accommodated in a way that does not arbitrarily penalize students who have a valid excuse. Consideration will also be given to students whose dependent children experience serious illness.

University Withdrawal Policy

A student may officially withdraw from this class with an automatic W at any time before the University's deadline. No withdrawals will be allowed after this date. This is University policy. Automatic withdrawals will not be made by the instructor. To be withdrawn from the class, students must take the appropriate actions on or before the University deadlines.

Academic Honor Policy

Academic dishonesty is prohibited and is considered a violation of the UTEP Handbook of Operating Procedures. It includes but is not limited to, cheating, plagiarism, and collusion. Cheating may involve copying from or providing information to another student, possessing unauthorized materials during a test, or falsifying research data on laboratory reports. Plagiarism occurs when someone intentionally or knowingly represents the words or ideas of another as one's own. Collusion involves collaborating with another person to commit any academically dishonest act.

Any act of academic dishonesty attempted by a UTEP student is unacceptable and will not be tolerated. All suspected violations of academic integrity at The University of Texas at El Paso must be reported to the Office of Student Conduct and Conflict Resolution (OSCCR) for possible disciplinary action. More information regarding UTEP policies related to academic integrity is available on HOOP: Student Conduct and Discipline.

Americans with Disabilities Act

Any student requesting accommodation based on a disability must register with the UTEP Center for Accommodations and Support Services (CASS). Contact the Center for Accommodations and Support Services at 915-747-5148, or email them at cass@utep.edu, or apply for accommodation online via the CASS portal. If you need to discuss accommodations that are already in place, please talk to me within the first two weeks of the semester. I will do my best to provide a positive and accessible learning environment for everyone in this class.

Copyright Policy

Some of the materials in this course are possibly copyrighted. They are intended for use only by students registered and enrolled in this course and only for instructional activities associated with and for the duration of the course. They may not be retained in another medium or disseminated further. They are provided in compliance with the provisions of the Teach Act.

Free Tutoring from UTEP

On-campus tutoring and writing assistance are available for many courses at UTEP. For more information, visit the Miner Learning Center (MLC). MLC offers professor, section-based supplemental instruction and tutoring. The professors handpick the students working for MLC, so visiting students are sure to have accurate, professor-based assistance. High-quality tutoring is available by appointment and on a walk-in basis. These services are offered by tutors trained to encourage the highest level of individual academic success while upholding personal academic integrity.

Your continuation in this course section beyond the drop/add period is presumptive evidence that you understand and agree to all the policies and expectations outlined in this syllabus.

Tentative Outline

Week 1	
08/27/2024 – Tuesday	Introduction & Syllabus
08/29/2024 – Thursday	Chapter 3: How Securities Trade
Week 2	
09/03/2024 – Tuesday	Chapter 3: How Securities Trade
09/05/2024 – Thursday	Chapter 5: Risk, Return, and the Historical Records
Week 3	
09/10/2024 – Tuesday	Chapter 5: Risk, Return, and the Historical Records
09/12/2024 – Thursday	Chapter 6: Efficient Diversification
Week 4	
09/17/2024 – Tuesday	Chapter 6: Efficient Diversification
07/19/2024 – Thursday	Project/Lab Session
Week 5	
09/24/2024 – Tuesday	Summary & Review
09/26/2024 – Thursday	Exam 1
Week 6	
10/01/2024 – Tuesday	Chapter 10: Bond Prices and Yield
10/03/2024 – Thursday	Chapter 10: Bond Prices and Yield
Week 7	
10/08/2024 – Tuesday	Chapter 11: Managing Bond Portfolios
10/10/2024 – Thursday	Chapter 11: Managing Bond Portfolios
Week 8	
10/15/2024 – Tuesday	Chapter 13: Equity Valuation
10/17/2024 – Thursday	Chapter 13: Equity Valuation
Week 9	
10/22/2024 – Tuesday	Project/Lab Session
10/24/2024 – Thursday	Summary & Review
Week 10	
10/29/2024 – Tuesday	Exam 2
10/31/2024 – Thursday	Chapter 15: Options Markets
Week 11	
11/05/2024 – Tuesday	Chapter 18: Evaluating Investment Performance
11/07/2024 – Thursday	Chapter 18: Evaluating Investment Performance
Week 12	
11/12/2024 – Tuesday	Chapter 19: International Diversification
11/14/2024 – Thursday	Chapter 19: International Diversification
Week 13	
11/19/2024 – Tuesday	Presentation (Groups 1, 2, 3, & 4)
11/21/2024 – Thursday	Presentation (Groups 5, 6, & 7)
Week 14	
11/26/2024 – Tuesday	Presentation (Groups 8, 9, & 10)
11/28/2024 – Thursday	<i>Thanksgiving Holiday – No Class</i>
Week 15	
12/03/2024 – Tuesday	Summary & Review
12/05/2024 – Thursday	Summary & Review
Week 16	
12/10/2024 - Tuesday	Final Exam – (1:00 pm – 3:45 pm)
	THANK YOU

