

FINA 4310: Survey of Investments
Syllabus¹
MWF 10:10-11:00am; Room 112, Sanford

Instructor: Mihail Miletkov
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Phone: 706-542-7175 WebCT Page: http://webct.uga.edu/
Office Hours: M, W 11:00-12:00pm

Required Materials:

Essentials of Investments, 6th edition by Bodie, Kane, and Marcus (McGraw Hill Publishing)

Recommended:

A financial calculator is helpful for the course. The following calculator will be supported in class lectures: TI BA II PLUS.

Catalog Description:

The securities markets, investor objectives, introduction to portfolio theory and the analytical tools of portfolio management, and an examination of investment alternatives.

Course Objectives:

The objective of this course is to enhance the students' understanding of the way in which financial markets function. The students are introduced to the concepts and operations of the risk-and-return relationship, securities trading and transaction costs, mutual funds and their expenses, valuation models, efficient diversification, asset pricing models, arbitrage, and behavioral finance.

Prerequisites:

FINA 3000: Financial Management
MSIT 3000: Statistical Analysis for Business (or STAT 3000)

Course Grading Policies:

Three in-class tests*	20% each
Portfolio optimization project in Excel	10%
StockTrak portfolio simulation and presentation	10%
Final Exam**	20%

*THERE ARE NO MAKEUP TESTS.

**The final exam is cumulative.

Attendance:

Attendance will not be taken in the class. However, students are responsible for all material covered in class, and all changes that are made to the course content during class. If you miss a class it is your responsibility to ask classmates for information, notes, etc. The lectures build on previous material, so regular attendance is essential for success in the course.

Homework:

Suggested problems will be assigned from the text, and solutions will be posted on the WebCT. Homework problems extend the concepts taught in class and are excellent preparation for test questions.

¹ The course syllabus is a general plan for the course; deviations announced to the class by the instructor may be necessary.

Honor Code:

All academic work must meet the standards contained in "A Culture of Honesty." All students are responsible to inform themselves about those standards before performing any academic work. See www.uga.edu/honesty.

Topics to be covered in the course:

- Introduction to Investments
- Financial Securities
- Securities Markets
- Mutual Funds
- Risk and Return
- Diversification
- Asset Pricing
- Efficient Markets and Behavioral Finance
- Bond Valuation and Bond Portfolio Management
- Equity Valuation
- Derivatives
- Matrices and Excel applications
- Additional Topics

Note: This schedule is tentative and subject to change over the course of the semester.

Important Dates:

The final exam is scheduled for Friday, December 14th, 8-11am.