

Baruch College

Economics & Finance

FIN 4710

Fall 2018

Instructor: Chris Droussiotis
Office hours: 7:00am – 8:00 am by appointment
Cell Phone: (908) 930-4725
e-mail: christakis.droussiotis@baruch.cuny.edu
website: www.ProfessorDrou.com

Course: Fin4710 Advanced Investment Analysis-
Saturday, 8:15am-10:45am (Previously 7:50am)

Course Objective:

The objective of this course is to teach the fundamental concepts and tools that represent the core of investment analysis. Individuals taking this course will develop an understanding of all the basic terminology used everyday on Wall Street; develop a sense of risk and rewards mechanisms that applied across major asset classes. These basic tools, as well as “time-value of money” and risk & rewards assessment will be used to construct and manage a portfolio of investments. Also, the course will familiarize the students with ways in which analytical techniques are applied to a variety of problems in financial management. The Course will supply institutional material necessary for solid understanding of the environment in which financial decisions are made.

Course Overview:

The course is a continuance of FIN3710. As in FIN3710, the course is divided into three parts consisting of two to four chapters each from the accompanying textbook (Essentials of Investments). Each part, which will be taught in two sessions, is a self-contained unit that will normally comprise one segment of a course in financial management. The parts are arranged in what the instructor believes is the most logical sequence starting from understanding investment analysis concepts, to applying those to construct a portfolio of investments and how to manage these investments in order to maximizing return. The three parts are highlighted in the “Course Outline” section, pages 5-6, of this syllabus.

Required Text:

Essentials of Investments – latest Edition
Zvi Bodie, Alex Kane & Alan Marcus
Bookstore

Optional Books:

The Quants: How a New Breed of Math Whizzes Conquered Wall Street and Nearly Destroyed It

Scott Patterson

Amazon Link: <http://www.amazon.com/Quants-Whizzes-Conquered-Street-Destroyed/dp/0307453375>

Materials to be provided by the Instructor:

- IPO offering prospectus on a live deal
- Bond Prospectus on a live deal
- Excel spreadsheets of various portfolio management analyses Equity and Bond Analysis / DCF / CAPM models / Derivative

Course Requirements:

Attendance:

Students are expected to attend and to participate in classroom discussions. It is important to attend every class because the Exams are based on the instructor's lectures and classroom notes. Class participation will count as part of the course grade. Attendance accounts for 10% of your grade.

Homework:

Reading assignments and application projects will be assigned. Check Homework assignments and datelines on the professor's website at www.ProfessorDrou.com under FIN 4710. Homework is accessible on CONNECT. Homework accounts for 10% of your grade. Also check datelines on the syllabus schedule below.

Project:

Financial and Valuation Analysis - TBA

Exams:

There will be a midterm and a final exam.

Midterm Studies: Text Book Chapters 5-14 (except 12).

Final Exam Studies: Text Book Chapters 15-20 (except 19).

Grading:

Mid Term Exam *	30%
Final Exam*	30%
Homework	15%
Attendance	10%
Project	15%
Total	<hr/> 100%

***CD Factor:**

This is to give the benefit for students of significant improvement between Mid-Term Exam and Final. The Weighted averages are as follows:

Improvement	Mid-Term Weighting	Final Exam Weighting
35% and higher	10%	50%
30-34%	15%	45%
25%-29%	20%	40%
20%-24%	25%	35%
19% or lower (including negative)	30%	30%

Handouts

All Handouts and lecture notes are posted on the website: www.ProfessorDrou.com under FIN 4710.

Academic Integrity

Cheating and plagiarism are serious offenses. The following definitions are based on the College's Academic Honesty website:

Cheating is the attempted or unauthorized use of materials, information, notes, study aids, devices or communication during an academic exercise.

Examples include but are not limited to:

- Copying from another student during an examination or allowing another to copy your work
- Unauthorized collaborating on a take home assignment or examination
- Using unauthorized notes during a closed book examination
- Using unauthorized electronic devices during an examination
- Taking an examination for another student
- Asking or allowing another student to take an examination for you
- Changing a corrected exam and returning it for more credit
- Submitting substantial portions of the same paper to two classes without consulting the second instructor
- Preparing answers or writing notes in a blue book (exam booklet) before an examination
- Allowing others to research and write assigned papers including the use of commercial term paper services

Plagiarism is the act of presenting another person's ideas, research or writing as your own, such as:

- Copying another person's actual words without the use of quotation marks and footnotes (a functional limit is four or more words taken from the work of another)
- Presenting another person's ideas or theories in your own words without acknowledging them
- Using information that is not considered common knowledge without acknowledging the source
- Failure to acknowledge collaborators on homework and laboratory assignment

My policy is to give a 0 grade to any assignment that has been plagiarized or an exam in which you have cheated. In addition, I am required by College policy to submit a report of suspected academic dishonesty to the Office of the Dean of Students. This report becomes part of your permanent file.

Other Information

- Cell phones must be turn off during class

Fin4710 Advanced Investment Analysis

Course Outline

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Class Schedules and Info:

* All lecture notes could be obtain by going to Professor Droussiotis's Website at www.ProfessorDrou.com under Baruch FIN 4710