

Professor

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| <i>Elena Mitropolsky, Course Captain</i> | C143 | emitropolsky@okanagan.bc.ca |
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Learning Outcomes

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| <p>Upon completion of this course students will be able to</p> <ul style="list-style-type: none"> 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 |
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Evaluation Procedure

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

Notes

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| <p>Classes are Tue/Thu 3:30 – 4:50pm in B112</p> <p>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.</p> |
| <p>StockTrak Investment Practice</p> <p>Each student will need to register an individual account at:</p> <p>https://www.stocktrak.com:443/members/register?session=Buad4502021</p> <p>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</p> |

margin and short-sell, based on your clients needs and if so desired. Your work will be evaluated base

