

University of North Texas at Dallas
Spring 2015
SYLLABUS

FINA 4200 090 /// Investments // 3hrs	
Department of	Finance
Division of	Business
Instructor Name:	Dr. Jeffrey A. Manzi
Office Location:	Founders Hall #235
Office Phone:	972-338-1807 (email is preferred and results in faster reply)
Email Address:	Jeffrey.manzi@untDallas.edu
Office Hours:	Alternating Tuesdays 3-7 PM beginning 01/20/2015 // Wednesday 6-10 PM, and by appointment
Virtual Office Hours:	
Classroom Location:	Dallas 2, Room 339 and https://learn.unt.edu
Class Meeting Days & Times:	Alternating Tuesdays beginning January 20, 2015 7PM – 9:50PM
Course Catalog Description:	First course for the individual investor. Idea of investment value; necessary prerequisites for an investment program; policies; economic and industry factors; introduction to security analysis and valuation; operation of security markets; security laws.
Prerequisites:	Completion of pre-business requirements, including FINA 3770, ACCT 2010D and ACCT 2020D or equivalent with grades of C or better, or consent of department.
Co-requisites:	
Required Text:	<i>Investments: Analysis and Management</i> , 12e, Jones, Charles P. ISBN 978-1-118-36329-4
Recommended Text and References:	Calculator: BA II PLUS by Texas Instruments (recommended) or any other calculator or app with time-value-of-money, IRR, and NPV functions.
Access to Learning Resources:	UNT Dallas Library: phone: (972) 338-1616; web: http://www.untDallas.edu/our-campus/library UNT Dallas Bookstore: phone: (972) 780-3652; e-mail: 1012mgr@fhq.follett.com
Course Goals or Overview:	
	The goal of this course is to provide knowledge that will allow students to apply Investments concepts to real world situations that they will likely encounter as they pursue careers in business and finance.
Learning Objectives/Outcomes: At the end of this course, the student will be able to:	
1	Explain the features and characteristics of common investment alternatives
2	Compute investment returns and risk
3	Explain how securities are traded
4	Compute the value of equity, debt, and basic derivatives securities
5	Analyze and formulate investment strategies for common stocks and bonds
6	Organize the management of an investment portfolio in a logical and systematic manner
7	Explain the techniques used in technical analysis and assess the role of technical analysis in an investments strategy.

Course Outline

This schedule is subject to change by the instructor. Any changes to this schedule will be communicated in class and/or Blackboard announcements and postings. Specific dates and details for activities, assignments, assessments, and items will be posted in Blackboard.

Week	Topic Covered	Text Reference
1	Understanding Investments	Chapter 1
2	Investment Alternatives	Chapter 2
3	Indirect Investing	Chapter 3
4	Securities Markets and Market Indices	Chapter 4
5	How Securities are Traded	Chapter 5
6	Investment Risk and Return Measurement	Chapter 6
7	Common Stock Valuation	Chapter 10
8	Midterm Exam (Chapters 1-6, 10)	
9	Common Stock: Analysis and Strategy	Chapter 11
10	Technical Analysis	Chapter 16
11	Bond Yields and Prices	Chapter 17
12	Bonds: Analysis and Strategy	Chapter 18
13	Options	Chapter 19
14	Futures Contracts	Chapter 20
15	Managing Financial Assets	Chapter 21
	FINAL (Chapters 11, 16-21)	

Course Evaluation Methods

This course will utilize multiple choice quizzes and exams to measure students' mastery of the learning outcomes for the course and to determine grades.

Grading Matrix:

Assessment Instrument	Value (points)	Total
Quizzes	14 quizzes at 20 points each	280
Midterm Exam	360 points	360
Final Exam	360 points	360
Total		1000

Grade Determination:

- A = 900 – 1000 pts (90% or better)
- B = 800 – 899 pts; (80 – 89%)
- C = 700 – 799 pts; (70 – 79%)
- D = 600 – 699 pts; (60 – 69%)
- F = 599 points or below (less than 60%)

University Policies and Procedures

Students with Disabilities (ADA Compliance):

The University of North Texas at Dallas faculty is committed to complying with the Americans with Disabilities Act (ADA). Students' with documented disabilities are responsible for informing faculty of their needs for reasonable accommodations and providing written authorized documentation. Grades assigned before an accommodation is provided will not be changed as accommodations are not retroactive. For more information, you may visit the Student Life Office, Suite 200, Building 2 or call Laura Smith at 972-780-3632.

Student Evaluation of Teaching Effectiveness Policy:

The Student Evaluation of Teaching Effectiveness (SETE) is a requirement for all organized classes at UNT. This short survey will be made available to you at the end of the semester, providing you a chance to comment on how this class is taught. I am very interested in the feedback I get from students, as I work to continually improve my teaching. I consider the SETE to be an important part of your participation in this class.

Assignment Policy:

You must submit assignments when they are due. If you must be absent, you will still be expected to submit assignments on time. It is your responsibility to contact someone (either your instructor or a classmate) to find out what you missed when you are absent.

Exam Policy:

Exams should be taken as scheduled. No makeup examinations will be allowed except for documented emergencies (See Student Handbook).

Academic Integrity:

Academic integrity is a hallmark of higher education. You are expected to abide by the University's code of Academic Integrity policy. Any person suspected of academic dishonesty (i.e., cheating or plagiarism) will be handled in accordance with the University's policies and procedures. Refer to the Student Code of Academic Integrity at <http://www.unt.edu/unt-dallas/policies/Chapter%2007%20Student%20Affairs,%20Education,%20and%20Funding/7.002%20Code%20of%20Academic%20Integrity.pdf> for complete provisions of this code. In addition, all academic work submitted for this class, including exams, papers, and written assignments should include the following statement:

On my honor, I have not given, nor received, nor witnessed any unauthorized assistance that violates the UNTD Academic Integrity Policy.

Bad Weather Policy (not applicable for online courses):

On those days that present severe weather and driving conditions, a decision may be made to close the campus. In case of inclement weather, call UNT Dallas Campuses main voicemail number (972) 780-3600 or search postings on the campus website www.unt.edu/dallas. Students are encouraged to update their Eagle Alert contact information, so they will receive this information automatically.

Attendance and Participation Policy (not applicable for online courses):

The University attendance policy is in effect for this course. Class attendance and participation is expected because the class is designed as a shared learning experience and because essential information not in the textbook will be discussed in class. The dynamic and intensive nature of this course makes it impossible for students to make-up or to receive credit for missed classes. Attendance and participation in all class meetings is essential to the integration of course material and your ability to demonstrate proficiency. Students are responsible to notify the instructor if they are missing class and for what reason. Students are also responsible to make up any work covered in class. It is recommended that each student coordinate with a student colleague to obtain a copy of the class notes, if they are absent.

Diversity/Tolerance Policy:

Students are encouraged to contribute their perspectives and insights to class discussions. However, offensive & inappropriate language (swearing) and remarks offensive to others of particular nationalities, ethnic groups, sexual preferences, religious groups, genders, or other ascribed statuses will not be tolerated. Disruptions which violate the Code of Student Conduct will be referred to the Office of Student Life as the instructor deems appropriate.

Eagle Connect Account:

All students should activate and regularly check their EagleConnect (email) account. EagleConnect is used for official communication from the University to students. Many important announcements for the University and College are sent to students via EagleConnect. For information about EagleConnect, including how to active an account and how to have EagleConnect forwarded to another e-mail address, visit <https://eagleconnect.unt.edu>