

Investments FIN 4350 / MBA 5510

Office Location and Office Hours: 317 Maurer Center Tuesday 10:30-11:30am Thursday 3:00-4:00pm
[Zoom](#) or Canvas Chat by appointment

Course Communication: Assignments and course communication will utilize the Canvas course site unless otherwise indicated. Questions related to course content and assignments should be posted as a discussion on Canvas. Only private questions will be answered on an individual basis through a direct message on Canvas.

Required Textbook: *Investments 11E* by Bodie, Kane and Marcus, ISBN: 978-1259277177

Any physical textbooks 9th edition and above are fine. Connect is not required. There are two copies of older editions on reserve in the library. *This book is the global standard in Investment education. Finance professionals should keep a reference copy throughout their career.*

Additional Materials: Instructions for accessing data, formulas, and review material are included in this [guide](#).

Online Content: Additional videos provided by your professor and other instructors supplement the textbook content. Regular Zoom sessions will be recorded to allow for students that are unable to attend.

Grading: Students missing a test with a valid note from a physician will receive the average of their remaining test grades. Students missing a test without such a note will receive a zero. This course does not have a curve, but extra credit opportunities are provided within several assignments. Different assignments can function as extra credit depending on what each student wants to get from the course. Final grades will be calculated out of 100% and are rounded to the nearest percentile. Example: 89.45% will be rounded to 89%

Canvas calculates grades by assignment group. If an assignment is missing or is not yet due, Canvas does not factor that assignment into the grade calculation. Missing assignments are marked as zero after the due date. Late assignments will receive 50% of the grade if submitted within a week of the due date. This does not apply to exams. No credit is available after the final day of class.

The following table shows how your final grade will be calculated:

Assignment	Weight
Relative Value (group)	25%
Portfolio Optimization (individual)	
Efficient Frontier (individual)	
Estimate Beta (individual)	
Participation (individual)	5%
Homework (individual)	10%
Exams (individual)	40%
Excel Project (group)	20%
Introduction to R for Finance	5%
Intermediate R for Finance	5%
Securities Industry Essentials (SIE) Exam	5%
Total	115%

Assignments: 50% credit will be given to late assignments received within one week of the due date. This does not apply to exams or Canvas based homework. Corrupted files will not receive credit.

Exams: Exams increase in level of difficulty. The final exam is cumulative but is weighted towards the most recent material covered in class.

Homework: Canvas calculates your homework grade based on the average of each attempted assignment. At the end of the semester, any homework that has not been attempted will receive a zero. *This will change your homework grade if you have not completed all the assignments.* Please take this into account when deciding where you want to spend your effort. Students may choose to spend less time on homework and more time learning to code or take the SIE depending on their priorities after graduation. The easiest way to earn an A is by doing the first coding assignment and all the homework. Students considering a sales oriented role should prepare for the SIE.

Participation: Class participation may include attendance of special events, market updates, peer evaluations, and classroom presentations. The total number of points may vary between classes but the weight remains the same. Details are provided throughout the semester.

Student Learning Outcomes: Upon completion of this course, students are expected to

- Demonstrate an understanding of risk and return
- Price equities and options
- Construct efficient portfolios
- Demonstrate proficiency using Excel in finance
- Demonstrate a basic knowledge of programming

Assessment: The learning outcomes will be assessed using exams, homework assignments, and applications in Excel.

Additional Academic Support: Students that need additional help are strongly encouraged to use the practice exercises. Tutors are also available through the BGSU library with advance notice. Finally, students should read the textbook before asking for additional help.

Technical Requirements:

Recent version of Microsoft Excel with Analysis ToolPak and Solver Add-ins

Remote Computer Labs: <https://bgsu.teamdynamix.com/TDClient/2070/Portal/KB/ArticleDet?ID=115279>

Computer specifications: <https://community.canvaslms.com/docs/DOC-2059>

Browser requirements: <https://community.canvaslms.com/docs/DOC-1284>

Zoom: <https://bgsu.teamdynamix.com/TDClient/2070/Portal/KB/ArticleDet?ID=112680&SIDs=7867>

Microsoft Teams: <https://www.bgsu.edu/its/wtlr/remote-work/ms-teams.html>

BGSU Canvas resource page: <http://www.bgsu.edu/provost/canvas-implementation/student-resources.html>

The Really Fine Print:BGSU [BSBA Learning Goals](#)BGSU Academic Policies: <https://www.bgsu.edu/catalog/academic-policies.html>

Grade	Course Percentage
A	90% and Above
B	80% to 89%
C	70% to 79%
D	60% to 69%
F	Below 60%

Students are expected to follow BGSU COVID-19 protocols at all times, which includes wearing a face covering in all classroom, studio, lab, and office spaces for as long as a University mandate is in place. Failure to comply with these protocols may result in disciplinary action under the Code of Student Conduct. Please refer to the BGSU COVID-19 website for the most current information about expectations and requirements.