

FINAN 461

Sec. 001 - Spring 2012

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Course Overview

FINAN 461 is designed to give students hands-on experience managing an investment portfolio. We take a client based approach to investment management.

Students in this class will learn or practice the following COBE Core Curriculum concepts, methods, and skills:	
1. Understand and apply analytical and disciplinary concepts and methods related to business and economics:	
<input checked="" type="checkbox"/>	1.4. Finance
<input checked="" type="checkbox"/>	2.1. Communicate effectively: Write messages and documents that are clear, concise, and compelling
<input checked="" type="checkbox"/>	2.2. Communicate effectively: Give oral presentations that use effective content, organization, and delivery
<input type="checkbox"/>	3. Solve problems, including unstructured problems, related to business and economics
<input type="checkbox"/>	4. Use effective teamwork and collaboration skills
<input type="checkbox"/>	5. Resolve ethical issues related to business and economics

Course Learning Outcomes

- Understand how to profile a client as to risk tolerances and return objectives
- Understand how to allocate client assets to accomplish return goals within appropriate risk levels
- Understand how to select securities to accomplish return goals within appropriate risk levels
- Understand how to measure portfolio return and risk adjusted return
- Understand the levels of active portfolio management
- Understand how to measure the value added by active portfolio management

Outcomes Assessment

- Students will prepare and deliver a written and oral presentation profiling each of the three clients of the Student Managed Investment Fund
- Students will prepare and deliver a written and oral presentation that specifies the target asset allocation to accomplish the return goals given risk tolerances for each of the three clients of the Student Managed Investment Fund
- Students will give oral presentations of their candidates for security selection
- Students will prepare monthly written reports summarizing the returns to each of the three portfolios of the Student Managed Investment Fund