FINAN 460
Course Outline
Fall 2017

Course Overview

FINAN 460 is designed to give students hands-on experience managing an investment portfolio. We take a client based approach to investment management.

COBE CORE CURRICULUM STUDENT LEARNING GOALS AND OBJECTIVES

Students in this class will learn or practice the COBE Core Curriculum concepts, methods, and skills detailed below.

- Understand and apply analytical and disciplinary concepts and methods related to business and economics:
  - 1.4. Finance

- Communicate effectively:
  - 2.1. Communicate effectively: Write messages and documents that are clear, concise, and compelling
  - 2.2. Communicate effectively: Give oral presentations that use effective content, organization, and delivery

- Solve problems, including unstructured problems, related to business and economics:

- Use effective teamwork and collaboration skills

- 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