2012

FINC 664-01 Bond Portfolio Management

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Professor Mary Beth Shagena, MBA  
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Office:  513-745-3564  Cell:  513-290-7223  
Class Time and Location:  SMH 106; Wednesday 6:00-8:30pm  
Office Hours:  Tuesday/ Wednesday 4:00-6:00pm and by appointment  
Office Location: SMH 109 (Fifth Third Trading Center)  

“Xavier University is a community of inquiry in the Catholic, Jesuit tradition dedicated to forming students intellectually, morally and spiritually, with rigor and compassion toward lives of solidarity and service.” Michael Graham, S.J., President.  

Mission of the Williams College of Business:  We educate students of business, enabling them to improve organizations and society, consistent with the Jesuit tradition.  

Characteristics and Hallmarks of the Ignatian (Jesuit) Spirituality include:  
- Sees life and the whole universe as a gift calling forth wonder and gratefulness;  
- Gives ample scope to imagination and emotion as well as intellect;  
- Seeks to find the divine in all things—in all peoples and cultures, in all areas of study and learning, in every human experience, and especially in the person of Jesus;  
- Cultivates critical awareness of personal and social evil, but points to God’s love as more powerful than any evil;  
- Stresses freedom, need for discernment, and responsible action;  
- Empowers people to become leaders in service, “men and women for others,” building a more just and humane world;  
- Cura Personalis “Care for the individual person;”  
- Magis “More” or “Continuous quality improvement.”  


Course Co-requisite:  FINC 663.  

Course Description:  Students will manage a fixed income portfolio in accordance with the investment guidelines set forth by the Investment Advisory Committee of the Board of Trustees, Xavier University and the Prospectus approved by the IAC.  

Course Objectives:  Students will participate in the Operations Committee, the Economic Committee or the Portfolio Committee. Students will analyze the current holdings and develop and execute a strategy for managing the portfolio appropriate for the current economic environment. Collectively, the class will prepare a written and oral presentation to the Bond Committee of the Finance Department Board of Executive Advisors and as required by the Investment Advisory Committee of the Board of Trustees.  

Attendance:  It is expected that all students will attend each class session. In the rare circumstance that a student finds it unavoidable and must miss a class, he or she should make arrangements to obtain lecture notes and any other material distributed in class from another member of the class. Reasonable attendance is a condition for the granting of academic credit.  

Academic Honesty:  Using any work that is not your own, giving permission to use your work or using any unauthorized information throughout the semester will result in a failing grade in the course and possible expulsion from Xavier University. All students are expected to adhere to the Xavier University Academic Honesty Policy as set forth in the catalogue.  

Grading and Evaluation:  There are no written exams. Grades will be assigned according to effort of the student and quality of written and oral presentations to the Bond Committee of the Finance Department BEA and/or the IAC of the Board of Trustees. This meeting is scheduled for Thursday, April 19, 2011 in SMH 106 from 9:00-10:30am. Students are expected to make appropriate arrangements to be in attendance.