2016

602 Investment Management

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Xavier University

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Investment Management 602

Winter 2016

**Text:** Investments, 11th Edition by Bodie, Kane and Marcus
Make sure you bring the book to class, you will need it every week

**Optional:** Any investment textbook would help. I will be happy to make a recommendation.

**When:** Each Thursday from 5:30 to 9:15. Beginning January 7, 2016

**Instructor:** Michael Bowling, CFA

**Office:** Any convenient location.

**Hours:** By appointment

**Contact:** itocalc@aol.com
    Work: 513-793-3777
    Home: 513-825-5018

**Grades:** Possible Grades are: A, A-, B+, B, B-, C, F.

<table>
<thead>
<tr>
<th>Breakdown of grade:</th>
<th>Option 1</th>
<th>Option 2</th>
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<tbody>
<tr>
<td>Test 1</td>
<td>25%</td>
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<tr>
<td>Test 2</td>
<td>25%</td>
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<tr>
<td>Final Exam</td>
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<td>30%</td>
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<tr>
<td>Project</td>
<td>15%</td>
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<tr>
<td>Optional Project</td>
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**Attendance:** Attendance is not required except on test dates! However, the lecture will be given only once. You are responsible for the information given in class. It is the opinion of your instructor that it is a serious mistake to miss class, and he knows what he is talking about. It is also a mistake to show up late and it is rude.

**Calculators:** You will need a calculator that will do higher order roots of numbers.

**Computers:** You will need Microsoft Excel and knowledge of basic statistical functions for assignments outside of class.

**Project:** There is one project everyone should complete and one additional optional project for those who chose to it. The optional project is only for those comfortable with linear algebra.

Project for all: See Handouts
Optional Project:
Content: The course covers various chapters of the textbook. The lectures will be supplemented by my notes and your participation. The intent is to cover a significant portion of the book. Exactly what portions will be covered will depend partially on your input. A tentative schedule is below.

Week 1 January 7, 2016 Chapters 1, 2
Week 2 January 14, 2016 Chapters 3, 4
Week 3 January 21, 2016 Chapter 5, 11
Week 4 January 28, 2016 Test 1 and project Excel workshop, mixed in with chapter 24
Week 5 February 4, 2016 Chapters 12, 6, Project rough draft, 1st three sections
Week 6 February 11, 2016 Chapters 7, 8,
Week 7 February 18, 2016 Test 2 and videos
Week 8 February 25, 2016 Chapter 9, 24
Week 9 March 3, 2016 Catch up and clean up, project due
Week 10 March 10, 2016 Final Exam

Assignments: Homework will be assigned every week. Some will be for thinking about, some will be needed exercises so that you can do well on the tests, and some will be handed in as needed inputs to the project. The assignment that are inputs to the project will get reviewed, handed back and rolled into your project grade.

Academic Honesty: It is expected that any work you hand in will be work that you did. It is also understood that people often work with others on homework. Whatever help you may receive from others, the work handed in needs to be your work and not copied or simply modified from others or the internet. If you have significant conversations with anyone regarding the project (including your instructor), those conversations should be footnoted or referenced appropriately. Plagiarism, including quoting without using quotation marks, is a form of cheating. *It is very important that you read, understand, and do your work consistent with Xavier’s policy on plagiarism.*

If it can be shown that you turned in work that was not your own work, I will do what I can to have you removed from the class.

_All information is subject to change and probably will very soon!_

_We shall not grow wiser before we learn that much that we have done was very foolish._

-- F.A. Hayek