Instructor: Dr. Vinod Venkiteshwaran  
OCNR 352, Ph (361)-825-3619  
Email: vinod.venkit@tamucc.edu  
Office Hours: MW-10AM-11AM, 3:30-5:30 PM

Required Materials:  
“Principles of Finance with Excel”- 2nd Ed. Simon Benninga, Oxford University Press  
Financial Calculator- Texas Instruments BA II Plus  
Reliable internet access

Prerequisites: FINA 3310

Communication: Include, “FINA 4390-First Name, Last Name” in the subject line of all of your email communications with me. Emails that do not follow this protocol will NOT be answered. I will use your email id on record with the University for all communication regarding class schedule, exams, assignment due dates and any other matters pertinent to the class. Therefore, please verify that the University records reflect your preferred email of choice in order to receive timely information from me. I will not entertain any excuses on the basis of non-receipt of emails from me.

Course Description: This course will cover the use of spreadsheet analysis in financial applications and introduce students to Microsoft Excel tools and functions to conduct business and personal financial analysis, valuation of bonds and stocks, and financial forecasting.

Learning Objectives:  
1) Format and present spreadsheets  
2) Learn to use excel functions to perform time value of money analysis.  
3) Use Solver and Goal Seek tools in problems with constraints  
4) Create XY charts and other line charts  
5) Perform regression analysis to estimate stock betas  
6) Calculate portfolio statistics for 2 and n-stock portfolios  
7) Create Data Tables to conduct scenario and sensitivity analysis

Relationship to Other Course Work: The material covered in this course will complement other Finance and Accounting courses and will be especially useful in the capstone course.

Instructional Methodology: The primary method of instruction will be through lectures and hands-on exercises in the computer lab.
Performance Evaluation and Grading:
6 In-Lab Assignments – 60%
Final Report-20%
Quizzes, Class Participation, Attendance-20%

The standard alphabetical grading scale is employed where

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Failure to complete all 6 assignments or the Final report will automatically result in an F grade for the class. Because of the nature of a lab course, **any missed assignments cannot be made up.** If a student is able to demonstrate a **valid reason** for missing an assignment such as in the case of medical emergencies, then the **average grade on the remaining assignments** will be used in lieu of the missed assignment. **Only one such excuse will be tolerated.**

Oral and Written Communication Content: Students are required to prepare formal written projects and oral presentations for the semester. Effective written communication is necessary for the successful completion of the course. Students are expected to participate actively in class discussion of the topics and issues covered in the course, and will be rewarded though their class participation grade for doing so.

Technology Applications: Students are required to use computer applications, computer databases, and online information services for this course. Written presentations must be prepared with word processing software and the use of computer graphics and computer-based visuals is encouraged. The semester report requires that students use computer databases and online information services.

Ethical Perspectives: The difficulty of assigning financial values to human welfare, moral and ethical concepts in a cost-benefit or risk-return analysis is stressed. Ethics in financial analysis is stressed not only for the consumer but for employees, government, and stockholders.

Global Perspectives: Corporate investments and/or personal investments are global activities. This course while focused on the domestic U.S. markets is equally applicable to analysis of multinational companies and investments in global equity and debt markets.

Academic Honesty: This course, and all other courses offered by the College of Business (COB), requires all of its students to abide by the COB Student Code of Ethics (available online at [www.cob.tamucc.edu](http://www.cob.tamucc.edu)). Provisions and stipulations in the code are applicable to all students taking College of Business courses regardless of whether or not they are pursuing a degree awarded by the COB.
Americans with Disabilities Act Compliance:

The Americans with Disabilities Act (ADA) is a federal anti-discrimination statute that provides comprehensive civil rights protection for persons with disabilities. Among other things, this legislation requires that all students with disabilities be guaranteed a learning environment that provides for reasonable accommodation of their disabilities. If you believe you have a disability requiring an accommodation, please contact the Disability Services Office at (361) 825-5816 or visit the office in Driftwood 101.

If you are a returning veteran and are experiencing cognitive and/or physical access issues in the classroom or on campus, please contact the Disability Services office for assistance at (361) 825-5816.

Chapters covered from PFE:

Part 1- Chapters 1,2,3,4,7
Part 2- Chapters 8,9,10,11,12
Part 3- Chapters 14,15,16
Excel Reference Part 4- Chapters 24 thru 29

Tentative Schedule:

Week 4- Assignment 1
Week 6- Assignment 2
Week 8- Assignment 3
Week 10- Assignment 4
Week 12- Assignment 5
Week 14- Assignment 6
Week 16- Final Report