Prerequisites: MATH1325 or equivalent, ACCT 2301, ACCT 2302, and Junior standing or above.

Required Materials:


Access to Connect Finance: Weblink will be available on the syllabus available through Bb

Remote Proctor from Software Secure- Additional Information will be available on syllabus available through Bb (Note: You will need a computer enabled with webcam and microphone in a quiet secure room to complete your exam; If this is not possible please contact your instructor ASAP)

Financial Calculator- Texas Instruments BA II Plus Recommended

Course Description:

Framework of financial markets, valuation of the firm, security analysis, investment equity versus debt, efficiency of market evaluation, diversification efforts, investment goals, and portfolio selection.

Grades

<table>
<thead>
<tr>
<th>Connect- Chapter review assignments (unlimited attempts)</th>
<th>100</th>
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<tbody>
<tr>
<td>Connect- Chapter Quizzes (Single attempt)</td>
<td>100</td>
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<tr>
<td>2 Exams using Remote Proctor@ 150 Points Each</td>
<td>300</td>
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<tr>
<td>Not graded- Math and Statistics Primer on Connect</td>
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Important:

The chapter review assignments will contain a different set of questions in each attempt. Therefore please make sure that you make several attempts to get maximum coverage of the material in each chapter. This will also help in preparation for quizzes and tests.

The due dates on the chapter review assignments are the last day of class. However, the quizzes become due at specified dates. Likewise there are specific deadlines for the tests as well. Due to the nature of the course there will no make up quizzes or tests administered.

Chapter coverage:

The course will cover Chapters 1-12 except for Chapter 8 and Special Topic on Chapter 13.

<table>
<thead>
<tr>
<th>Week 1</th>
<th>Chapters 1/2</th>
<th>Quiz 1 Due</th>
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<tbody>
<tr>
<td>Week 2</td>
<td>Chapters 3/4</td>
<td>Quiz 2 Due</td>
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Relationship to Other Coursework:

This course provides an introduction to investment management issues, which complement the broader financial management issues discussed in IINA3310. This course is a prerequisite to the advanced course in investments, Portfolio Theory and Security Analysis (IINA 4332). An understanding of the investment concepts is also useful for understanding related Finance concepts including Corporate Finance (FINA 3310, FINA 4310), International Finance (FINA 4315), and, Financial Statement Analysis (FINA 4334).

Learning Objectives:

By the end of this course, the students will be able to:

1. Learn the basic financial concepts involved in investment management.
2. Understand the processes involved in investment management.
4. Learn how to calculate investment return with both arithmetic and geometric means.
5. Calculate the present value of future cash flows.
6. Learn how to calculate the risk of an investment.
7. Learn how to calculate the selling price of stocks and bonds.

Oral and Written Communication Content:

All major exams, homework, and the final exam are essay, mathematical manipulation or multiple choice. All major exams and homework are graded and returned to the student. As class size permits, students will be required to express themselves on various current topics or concepts.

Technology Applications:

Students are required to possess and have knowledge in the use of business or advance engineering calculators. Time value of money and other related financial computations are required in their usage. Text problems assigned as homework will often have a 3 1/2" floppy disk and spread sheet applications.

Ethical Perspectives:

Financial reporting requirements for public corporations are under the purview of the Security Exchange Commission. Accrual based accounting within the guidelines of Generally Accepted Accounting Principles form the basis of responsible reporting. The moral and legal issues in a very highly regulated industry is reviewed and discussed.

Global Perspective:
The global nature of investment is stressed through the course. The impact of International diversification on the riskiness of portfolios is examined on several levels.

**Demographic Diversity Perspective:**

The diversity within and among this country and that of other countries is discussed as it affects investments. The financial goals of investors and their collective impact on demographic diversity are reviewed.

**Political Social, Legal, Regulatory, and Environmental Perspectives:**

Prospectuses informational requirements are delineated. Registration and trading regulations are reviewed. Several sample exam questions from Chartered Financial Analysts exams are distributed and reviewed.

**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.

**Student Ethics Code**

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) 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.

**Academic Honesty:**

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**Grade Appeals**

As stated in University Rule 13.02.99.C2, Student Grade Appeals, a student who believes that he or she has not been held to appropriate academic standards as outlined in the class syllabus, equitable evaluation procedures, or appropriate grading, may appeal the final grade given in the course. The burden of proof is upon the student to demonstrate the appropriateness of the appeal. A student with a complaint about a grade is encouraged to first discuss the matter with the instructor. For complete details, including the responsibilities of the parties involved in the process and the number of days allowed for completing the steps in the process, see University Rule

These documents are accessible at http://www.tamucc.edu/provost/university_rules/index.html. For assistance and/or guidance in the grade appeal process, students may contact the Office of Student Affairs.