Course Syllabus
FIR 3710 M50 – Investments
Fall 2018
3 Credit Hours

Instructor: Kelley Anderson
E-mail: kndrsn13@memphis.edu
Office: FCBE #444
Office Hours: By Appointment in office or online through BlueJeans meeting space located at http://bluejeans.com/8347369377

Course Overview:
This course covers fundamental concepts and theories of investing, including financial markets and instruments, portfolio theory, bond and stock valuation, and portfolio performance evaluation. The goal of this class is to provide you with a framework for thinking about investment theory and show you how to address investment problems in a systematic manner.

Pre-Requisites/Co-Requisites:
FIR 3410

Required Texts (and Related Materials):
Textbook: Essentials of Investments: 10th edition by Zvi Bodie, Alex Kane, and Alan Marcus
You may also purchase a previous version of the book.
Business/Financial Calculator: Texas Instruments BAII PLUS or BAII PLUS Professional

Recommended Texts (and Related Materials):
Recommended reading: The Wall Street Journal. It comes in print, digital, and many social network versions. To take advantage of a 75 percent educational discount, visit wsj.com/studentoffer (opens in new window).
**Location of Course Materials:**
All class assignments submissions, notes and other material will be available on the ecourseware website: [https://elearn.memphis.edu](https://elearn.memphis.edu).

**Course Objectives:**
The objective of this course is to study the fundamental concepts and theories of investing, including financial markets and instruments, portfolio theory, bond and stock valuation, and portfolio performance evaluation. By the end of the course, students should be able to understand the mechanics of investing, and make informed investment decisions.

**Fogelman College: Learning Outcomes for Your Degree**
This course is designed to help you to meet the overall learning objectives for the BBA degree offered by the Fogelman College. You should take the time to become familiar with the overall learning objectives as a student in the BBA degree program.

- [BBA Program Outcomes (opens in new window)](https://elearn.memphis.edu)

**Grading**
The grade weights and a discussion of each of the grade categories are provided below. We will be utilizing the grade book within the eLearn system; frequent feedback can help to diagnose and correct deficiencies.

<table>
<thead>
<tr>
<th>Module Quizzes</th>
<th>50%</th>
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<tbody>
<tr>
<td><strong>Investment Project</strong></td>
<td>15%</td>
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<tr>
<td><strong>Discussion</strong></td>
<td>15%</td>
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<tr>
<td><strong>Assignments</strong></td>
<td>20%</td>
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**Module Assignments**
There will be several homework problems assigned throughout the semester. These problems will allow you an opportunity to practice the concepts from the chapter with the aim of improving the retention of the material covered. These might include a practical assignment or be related to supplemental reading. They may require some extracurricular research.
Discussions
Participation and interaction are very important parts of the learning process. We will use discussion forums that will largely consist of chapter specific discussions, with some occasional, special topics if current events or extra coverage of a topic are deemed necessary. These discussions help prepare you for your quizzes. For the online course, the discussion forums will be located in the eLearn system. Discussion grades will be determined from the quality of the posts, not the quantity. Please participate at least once each week.

Group Trading Project
Students will work as investment teams to complete a simulated trading project. Detailed instructions are available within eLearn and the project is due at the end of the term. It is worth 15% of your grade.

Module Quizzes
There will be a quiz for each module. This will allow for regular points of feedback throughout the course and provide you an opportunity to assess and correct problems early. Quizzes will be administered through the eLearn system and you will have two attempts at each quiz (the higher score of the two will be recorded).

Make-Up Policy
Because modules are available for extended periods, there will not be make-up assignments. Special accommodations may be possible if you contact your instructor before the respective due date, however this is not a guarantee. Allow yourself the time to take the quizzes and complete assignments, and make plans in case something goes wrong.

ADA
Every effort will be made to accommodate students with disabilities in accordance with the Americans with Disabilities Act. Please contact me during the first week of the semester to arrange for accommodations and, if you have not done so already, the Office of Disability Services (SDS) at http://saweb.memphis.edu/sds/ or (901)678-2880.

Time Management in an Online Course
There will be no last minute extra-credit opportunities. Do the work as it is assigned and stay ahead of deadlines. With an online class, you have many opportunities to work ahead so please use this to your advantage. Time management is as valuable of a skill to learn as financial management.

Grade Distribution
The following grade distribution will be used for this course. Please use this as a reference in calculating your final letter grade.
<table>
<thead>
<tr>
<th>Range</th>
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<tbody>
<tr>
<td>92%-100%</td>
<td>A</td>
<td>84%-87%</td>
<td>B+</td>
<td>70%-74%</td>
<td>C+</td>
<td>56%-59%</td>
<td>D+</td>
</tr>
<tr>
<td>88%-91%</td>
<td>A-</td>
<td>80%-83%</td>
<td>B</td>
<td>65%-69%</td>
<td>C</td>
<td>50%-55%</td>
<td>D</td>
</tr>
<tr>
<td>75%-79%</td>
<td>B-</td>
<td>60%-64%</td>
<td>C-</td>
<td>Below 50%</td>
<td>F</td>
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**Professor's Expectations**

1. Your success in this class is important to me. I will be available to assist you in every possible way of enhancing your learning experience.

2. Students are expected to stay current in their reading assignment preparation and regularly visit the course website.

3. Utmost ethical conduct is expected from everyone. Academic dishonesty and cheating will result in the appropriate academic and university penalties to the extent that an "F" may be assigned for the course grade and the student may be dismissed from the University for Disciplinary Reasons.

**Student's Expectations**

In my role as your instructor, there are certain things you can expect from me including: well-organized and engaging learning experience, response to emails within two (2) business days (most likely sooner) and feedback on all work submitted within one week.

**Academic Honesty**

Academic honesty is fundamental to the activities and principles of a university, and more broadly to society at large. Any effort to gain an advantage not given to all students is dishonest, whether or not the effort is successful. The University has specific Academic Honesty Policies; please see the policies in the U of M Student Handbook. Because academic honesty is extremely important the consequences of dishonesty are serious, ranging from probation to expulsion. Please feel free to see me concerning issues associated with academic honesty.

**Additional Student Support**

Career advising is available through the University of Memphis Career Services:

400 Wilder Tower
Phone: (901) 678-2239
Email: ces@memphis.edu