# CLASS INFORMATION

**MBA 653 A - Investment Theory and Portfolio Management**  
Fall 2016  
October 6th – December 8th  
Thursdays, 6:30-9:30 PM  
Classroom: Refer to MyBenU

## COURSE PREREQUISITE

MBA 651

## INSTRUCTOR INFORMATION

Darryl Franklin, Ph.D.  
Email: dfranklin@ben.edu  
Office Hours by Appointment

## COURSE OBJECTIVES

As a result of this course, you will be expected to:
- Discuss and evaluate various investment theories
- Compute key formulae used in investment analysis
- Evaluate, research, assess and report on various investment decisions as outlined in assigned case studies
- Distinguish between various asset classes
- Appraise several trade equity options and recommend the best equity option

## CLASS OVERVIEW & GRADING

<table>
<thead>
<tr>
<th>Component</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class attendance and participation</td>
<td>9</td>
</tr>
<tr>
<td>Quiz 1</td>
<td>20</td>
</tr>
<tr>
<td>Trading portfolio 1</td>
<td>10</td>
</tr>
<tr>
<td>Quiz 2</td>
<td>20</td>
</tr>
<tr>
<td>Trading portfolio 2</td>
<td>10</td>
</tr>
<tr>
<td>Final Exam</td>
<td>31</td>
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</tbody>
</table>

*Subject to change*

## REQUIRED TEXT

**Title:** Essentials of Investments  
**Author:** Bodie, Kane, & Marcus  
**Publisher:** McGraw Hill  
**Edition:** 10th  
**ISBN:** 9780077835422

Trade simulation software required, approximately $30 per quarter. Details in syllabus.

## IMPORTANT REMINDERS

Students are expected to check the class Desire2Learn (D2L) site prior to the first night of class and on an on-going basis.

Due to the Thanksgiving Holiday, there will be no class on Thursday, November 24th. We will be doing the normal 10 weeks of work in 9 weeks.

## PRE-CLASS ASSIGNMENT

Read Chapters 1 and 2