

# Business Administration

Course Number: **BUAD 450**

Course Title: **INVESTMENT MANAGEMENT**

Credits: 3

Calendar Description: In this course students will gain the knowledge and skills required for success as an investment professional or an individual investor. Topics include investment and portfolio theory, techniques for security analysis (fundamental and technical), valuation and management of various investment products, international investing, and portfolio management and performance evaluation. Careers and ethics in investment management will be discussed. *(also offered by Distance Education)*

Semester and Year: **FALL 2022**

Prerequisite(s): BUAD 350, and third-year standing

Corequisite/F1 11.04 Tf1 0





(70%), and your risk-adjusted return (30%).

The investment report should reflect the student's knowledge of securities analysis and portfolio management. It should include the following sections:

Course Schedule

2022 Week of:		Classes Start: Wednesday, September 7 STAT Friday, September 30 STAT Monday, October 10 STAT Friday, November 11 Last day of regularly scheduled Classes: Tuesday, December 6	
Sep	5	Introduction Investment Policy Statement for Individual and Institutional Investors	
	12	Managing Investment Portfolio for a client Industry Ethics – CFA Code of Ethics and Standards of Professional Conduct	Ch. 2
	19	Portfolio Management: Active vs Passive, Style Analysis Risk Measurement Performance Measurement and Attribution	Ch. 11, 18
	26	Bonds – Review of interest rate sensitivity, duration and convexity Credit Analysis	Ch. 12
Oct	3	Investing in Bonds and Preferred Shares - Strategies	Ch. 13
	10	Common Stock Analysis Economic Indicators and Industry Analysis	Ch. 8, 9 Koller: Ch 6, 9, 10
	17	Review of Strategy Financial Ratio Analysis Forecasting, Earnings Quality <i>No class on Monday Oct 10</i>	Koller: Ch 11
	24	Relative Valuation using mBMC 162.60 g0 G(R)(ela )-G 0.066q80.5514eW*h	

## **SKILLS ACROSS THE BUSINESS CURRICULUM**

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The Okanagan School of Business promotes core skills across the curriculum. These skills include reading, written and oral communications, computers, small business, and academic standards of ethics, honesty and integrity.

## **STUDENT CONDUCT AND ACADEMIC HONESTY**

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### **What is the Disruption of Instructional Activities?**

At Okanagan College (OC), disruption of instructional activities includes student “conduct which interferes with examinations, lectures, seminars, tutorials, group meetings, other related activities, and with students using the study facilities of OC”, as well as conduct that leads to property damage, assault, discrimination, harassment and fraud. Penalties for disruption of instructional activities include a range of sanctions from a warning and/or a failing grade on an assignment, examination or course to suspension from OC.

### **What is Cheating?**

“Cheating includes but is not limited to dishonest or attempted dishonest conduct during tests or examinations in which the use is made of books, notes, diagrams or other aids excluding those authorized by the examiner. It includes communicating with others for the purpose of obtaining information, copying from the work of others and purposely exposing or conveying information to other students who are taking the test or examination.”

Students must submit independently written work. Students may not write joint or collaborative assignments with other students unless the instructor approves it in advance as a group/team project. Students who share their work with other students are equally involved in cheating.

### **What is Plagiarism?**

Plagiarism is defined as “the presentation of another person’s work or ideas without proper or complete acknowledgement.” It is the serious academic offence of reproducing someone else’s work, including words, ideas and media, without permission for course credit towards a certificate, diploma, degree and/or professional designation. The defining characteristic is that the work is not yours.

“Intentional plagiarism is the deliberate presentation of another’s work or ideas as one’s own.” Intentional plagiarism can be a copy of material from a journal article, a book chapter, data from the Internet, another student, work submitted for credit in another course or from other sources.

“Unintentional plagiarism is the inadvertent presentation of another’s work or ideas without proper acknowledgement because of poor or inadequate practices. Unintentional plagiarism is a failure of scholarship; intentional plagiarism is an act of deceit.”

Students have a responsibility to read the OC Academic Integrity Policy outlined in the OC calendar, which is available online [OC Academic Integrity Policy](#). Students must acknowledge the sources of information used on all their assignments. This usually involves putting the authors’ name and the year of publication in parentheses after the sentence in which you used the material, then at the end of your paper, writing out the complete references in a Reference section.

“Students are responsible for learning and applying the proper scholarly practices for acknowledging the work and ideas of others. Students who are unsure of what constitutes plagiarism should refer to the UBC publication “