COURSE MATERIALS

Lecture notes and assignments will be distributed via Blackboard.

Required Textbooks:


Other readings (buy used copies):


FINAL GRADE ASSIGNMENT

Grades
Mid-Term: 40%

Equity Challenge competition: 60% (team work)

Teams: Each student must be part of a team of 4 members. Please take advantage of student diversity in your class. Your team is expected to work on class assignments and the equity challenge competition.
Department of Finance and Economics  (29:390:470)

COURSE SCHEDULE

Course Outline

Week 1: Principles of Security Analysis Lectures 1A & 1B
Buying a business Lecture 1C
Read Accounting Clinic 1 Appendix 1

Week 2: Balance Sheet, Income Statement Lectures 2A & 2B
Appendix 2
Read Accounting Clinic 2
Work on Assignment 2

Week 3: Cash Flow Statement
Lecture 2B CF Stat Example.xls
Work on Assignment 3

Week 4: Common Size & Ratio Analysis Lectures 3A & 3B
Work on Assignment 3
Work on Lecture 3B Financial Ratios Example.xls

Week 5: Financial Modeling Lecture 4
Review for Mid-Term Review on BS and IS

Week 6: Mid-Term Exam (1.5 hour exam)
10K, 10Q, MDA, Value Line, SEC Filings, Private notes
Bloomberg FA data
Week 7:  Modeling Financial Statements Part I, II  Modeling Training 1,2.xls

Week 8:  Modeling Financial Statements Part III  Modeling Training 3.xlsx

Week 9:  Two Wise Men  Lecture 5

Sources of Value  Lectures 6, 7

Week 10:  Intrinsic Value  Lectures 8, 9

WD40 Example.xlsx

Week 11:  Wall Street vs. Main Street  Lecture Notes

Week 12:  Review student case studies.

Week 13:  1st round review of case competition

Week 14:  1st round review of case competition

Week 15:  Stock Challenge Competition