Professor James J. Bode  
Email: jbode@fordham.edu  
Class location and time: Lowenstein TBA: T,W,Th 1:00 – 4:00

Course Description: The basic theories and techniques of investment management are covered in this course. Initially, the financial environment and the major investment instruments will be reviewed. An emphasis of the course is on a solid understanding of risk and return and how these concepts are applied in the real world. Valuation of stocks, bonds and derivative securities will be covered as well as the key principles of portfolio theory.


Calculator: A financial calculator is required for this course.

Supplementary Reading: Students should read The Wall Street Journal on a daily basis. Fordham students have access on-line.

Method of Instruction: There will be a heavy emphasis on the textbook reading and assigned homework problems as well as lectures and explanation of homework problems during class. In addition, before each class, starting the third class, a student will provide a brief overview of the investment markets for the previous day based on reporting in The Wall Street Journal. The Instructor will provide this report the second day of class so that students understand the information to be covered by the daily review.

Grading: The grade will be based on three quizzes and a final exam. Each quiz will cover separate material. There will be no make-ups if a student misses one of the quizzes. In such a case, the other quizzes and the final will determine the grade. The final exam will be comprehensive but weighted more towards material that was covered subsequent to the third quiz. Attendance will be taken and students will be asked in class for the answers to the assigned homework. Although homework will not be collected or graded, the material that will appear on the quizzes and the final will be similar to the homework problems; hence, keeping up with the homework assignments is essential to doing well in the course.
The breakdown of the final grade is as follows:

- **First Quiz** 18% (chs. 2-6)
- **Second Quiz** 18% (chs. 7-10)
- **Third Quiz** 24% (chs. 11-16)
- **Final Exam** 40%

**Office:** The Instructor will be available before or after each class by appointment.

**Class Schedule:**

**Day:**

1. Introduction – lecture on Ch 1 and 2
2. Market report by instructor and lecture on Ch 3 and 4
3. Homework for Ch 2,3,4/lecture on Ch 5 and 6
4. Homework on Ch 5 and 6/Quiz # 1 (July 11)
5. Review Quiz #1/ lecture on Ch 7 and 8
6. Homework on Ch 7 and 8/lecture on Ch 9 and 10
7. Homework on Ch 9 and 10/Quiz #2 (July 18)
8. Review Quiz #2/ lecture on Ch 11 and 12
9. Homework on Ch 11 and 12/lecture on Ch 13 and 14
10. Homework on Ch 13 and 14/lecture on Ch 15 and 16
11. Homework on Ch 15 and 16/Quiz #3 (July 26)
12. Review Quiz #3/ Lecture on Ch 17 and 18
13. Homework on Ch 17 and 18/Lecture on Ch 19 and 20
14. Homework on Ch 19 and 20/Final Review
15. Final Exam (August 6)
Please note that this syllabus is subject to change.