Investments
Business 421
Classroom: Smith 340
Winter 2006 Semester

Instructors: Kimball Galbraith and Chris Andrews
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Texts: Essentials of Investments, 6th Edition by Bodie, Kane, and Marcus
The Richest Man in Babylon by George S. Clason
One Up on Wall Street by Peter Lynch

Prerequisites: Pre-Business Core, Math 108, Math 221, and B301 or an accounting equivalent. In addition, students must be proficient in Excel in order to pass this course.

Credits: 3 Semester Hours

Course Description: This course will cover topics found in the financial markets including investments, portfolio theory, asset allocation, stocks, fixed-income securities, security analysis, valuation, mutual funds, and derivative assets.

Course Objectives: Primary course objectives are as follows:
1. Develop and enhance the student’s understanding of investment concepts and principles by: a) emphasizing key ideas taught in the textbook, b) discussing investment-related current market issues, and c) sharing insights from the instructor’s professional experience.
2. Develop spreadsheet-modeling skills to better understand, evaluate, and apply key principles taught in portfolio management and security valuation.
3. Share insights and shape opinions about personal budgeting, consumer debt, and investing from an LDS perspective.
4. Apply investment concepts and skills by drawing upon principles taught in economics, statistics, general business, international business, and computer information systems.
5. Develop portable skills that can be utilized in many business areas.
6. Understand and expand finance related vocabulary.
Evaluation:
This class will be team taught by two Business Management teachers during this semester. Brother Andrews will teach the first 1/3 of the class (approximately 33% of your grade) while the remaining 2/3 (66% of your grade) will be taught by Brother Galbraith.

During this course credit will be given for quizzes, cases, and exams. Specific details will be provided in class.

Research Paper
You will be asked to write one research report based upon either the One Up on Wall Street or The Richest Man in Babylon book. The criteria for your research report will vary based upon the book you choose to read. The criteria for each report are described below.

One Up on Wall Street
Write a paper identifying 150 key investment principles that lead to success in the stock market. Your paper should also include a paragraph indicating what percentage of the book you read and provide feedback on whether you felt the book helped you gain further insights into investing in the stock market.

The Richest Man in Babylon
This paper should highlight some of the main principles of financial success you learned from the book. You will want to include your opinions interwoven with gospel research. You may want to share a few brief quotes from latter-day prophets or passages of scripture. At the end of the paper, you should discuss whether it is possible to become “The Richest Man in Zion” and also become “The Richest Man in Babylon.”

The paper should be at least 5 double-spaced typed pages, but no more than 8 pages in length. The paper will be graded based upon YOUR thoughts, opinions, and ideas. Do not turn in a paper that primarily consists of quotes from the book. You should discuss principles you learned from your reading and research; and describe how you will apply those principles in your life. In addition to content, you will also be graded on spelling, grammar, and punctuation.

You should indicate at the beginning or end of the paper the percentage of the book you read.

Grading Scale:
A = 93.0% - 100.0%  B- = 80.0% - 82.9%  D+ = 67.0% - 69.9%
A- = 90.0% - 92.9%  C+ = 77.0% - 79.9%  D = 63.0% - 66.9%
B+ = 87.0% - 89.9%  C = 73.0% - 76.9%  D- = 60.0% - 62.9%
B = 83.0% - 86.9%  C- = 70.0% - 72.9%  F = Below 60%
Class Policies:
Assignments will not be accepted if they are turned in late. However, assignments may be turned in early if you expect to miss class.

There will be no extra credit given in this course.

The Code of honor and Dress & Grooming standards apply and will be enforced.

Honesty will be strictly enforced. Students may receive and “F” for cheating in this course.

In compliance with applicable disability law, qualified students with a disability may be entitled to “reasonable accommodation.” It is the student’s responsibility to disclose to the SSD office any special need he / she may have and to provide the appropriate documentation of the disability. The SSD office is located inside the Learning Assistance Center.