

**COURSE SYLLABUS**  
**SOUTHEAST MISSOURI STATE UNIVERSITY**

**Department of Economics and Finance**

**Course No. FI568**

**Revision: Spring 2012**

**Title of Course: Portfolio Seminar**

**I. Catalog Description and Credit Hours of Course:**

Examination of the concepts relating to modern portfolio theory. Topics include efficient markets hypothesis (EMH), risk, portfolio performance, and related topics. (3)

**II. Prerequisites:** FI368 Investments with minimum grade of "C".

**III. Purposes or Objectives of Course:**

- A. Provide an in-depth practical study of the theories of portfolio management and investment.
- B. Give students an opportunity to plan, implement, and assess the performance of both simulated and real portfolios.

**IV. Student Learning Outcomes**

Upon completion of this course, students should be able to:

- A. Explain the portfolio management process, the student managed portfolio, the structure of equity markets, passive versus active investing, short selling, margin account, the historical distribution of returns in stocks, bonds and bills, country analysis, policy statement.
- B. Explain industry analysis, financial statement and ratio analysis, company analysis, equity valuation models, value investing, growth investing.
- C. Explain risk/return, modern portfolio theory, efficient frontier, efficient markets hypothesis, behavioral finance.

**V. Expectations of Students:**

- A. General

Each student is expected to perform professionally with reference to attendance, participation, compliance with assignments, including microcomputer projects, etc. This is a professional course and requires a professional attitude on the part of the

student. This means that the assigned material should be read with discrimination, intellectual curiosity, reflective thinking, and critical analysis.

B. Readings

Each student will be expected to read the current issues of the *Wall Street Journal* and become familiar with other financial publications.

C. Class Projects

Each student will complete 3-5 word-processed reports. The reports will give students an opportunity to apply the classroom discussions to the current investment environment. Each student will be required to make 1-2 presentations during the semester. Graduate students will be required to complete an additional project and/or presentation.

D. Examinations

There are 3 examinations to be given in the course, including the final examination. The examinations are a combination of both subjective and objective questions.

**SUGGESTED TIME IN  
50 MINUTE PERIODS**

**VI. Course Content or Outline:**

A.	Investment Process, Portfolio Policy	3
B.	Equity Market Structure, Short Selling	3
C.	Margin Accounts, Forecasting	6
D.	Industry Analysis	6
E.	Financial Statement Analysis	6
F.	Company Analysis (Presentations)	12
G.	Risk, Return, Portfolio Theory, EMH	9
	Total	45

**VII. Textbook(s) and/or Other Required Material or Equipment:**

Bodie, Kane, & Marcus, (2011) *Investments*, (9<sup>th</sup> ed.). McGraw-Hill Irwin.

**VIII. Basis for Student Evaluation:**

- A. Quality of contributions by the student to the class.
- B. Quality of special class projects, homework assignments and papers.
- C. Level of understanding shown on the examination.
- D. Completion of microcomputer projects and presentations.

The weight of evaluation criteria may vary at the discretion of the instructor and will be indicated at the beginning of each class.