

COURSE OUTLINE

Year: 2006/2007

LEVEL: III, **TERM 1**

NAME OF THE SUBJECT: Investment Analysis & Strategy

NO. CREDITS: 4

NAME OF THE TEACHER: Derek Fisher

SHORT CV OF THE TEACHER: ... President, Metropolitan Life Works, Barcelona, Spain

Senior Vice President, Institutional Services, Zacks Investment Management, Chicago, IL USA

Financial Advisor, UBS PaineWebber, Palm Beach, FL USA

Financial Advisor, Gruntal Securities, New York, NY USA

SEMESTER 1

COURSE DESCRIPTION: This course will extensively examine the behaviour of stocks in the important global markets and how to best determine the fair market value of the issues and why stocks move up and down

COURSE OBJECTIVE

At the end of this course, students will be expected to be able to competently create financial portfolios understanding the parameters of selection and confidently outperform their respective indexes .

COURSE STRUCTURE:

The course structure will closely mimic an investment policy committee of a mutual fund or an asset management company. Students will be required to run two portfolios, one of their own picks and one of the picks that they vote on every single week. Performance will be tracked and the grade given will come mostly from this performance. There will be three presentations that will also represent the remaining portion of the grade.

SYLLABUS

SEMESTER 1			
			CLASS SUBJECT
12 Sept -15 Sept	Enrolment / Orientation / Registration Week	Wk 1	Introduction, Class Rules, Class Contract
18 Sept -22 Sept	Teaching Week 1	Wk 2	US Equity Markets
25 Oct -29 Oct	Teaching Week 2	Wk 3	Large Cap, Small Cap, Mid Cap Growth vs. Value
02 Oct -06 Oct	Teaching Week 3	Wk 4	Behaviour of Stocks Fundamental Analysis
09 Oct -11 Oct	Teaching Week 4 12 Oct, 13 Oct Bank Holiday	Wk 5	Tech Stocks, Financial Stocks, Consumer Goods, Pharmaceuticals
16 Oct -20 Oct	Teaching Week 5	Wk 6	Utilities, Core Industrials, Telecommunications
23 Oct -27 Oct	Teaching Week 6	Wk 7	NYSE & NASDAQ
30 Oct -03 Nov	Teaching Week 7 01 Nov Bank Holiday	Wk 8	Introducing Technical Analysis
06 Nov -10 Nov	Teaching Week 8	Wk 9	Measuring Performance
13Nov -17 Nov	Teaching Week 9	Wk 10	Selecting Stocks in a Bull Market
20 Nov -24 Nov	Teaching Week 10	Wk 11	Selecting Stocks in a Bear Market
27 Nov -01 Dec	Teaching Week 11	Wk 12	Diversification and Asset Allocation Strategies
04 Dec -08 Dec	Teaching Week 12 06 Dec – 08 Dec Bank Holiday	Wk 13	Portfolio Review
11 Dec –15 Dec	EXAMS	Wk 14	Presentation
	TOTAL HOURS		

Course text Books Recommended SEMESTER 1

Wall Street Journal, Barrons, Forbes, Investors Business Daily, www.zacksadvisor.com

STUDY CASES SEMESTER 1