



Instructor: Tom Waskiewicz

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Virtual office hours: M-F, 4-6 P.M.

Investments: Portfolio Management

Through this course, students will develop a clear understanding of the practical implications of financial theory; acquire a framework for understanding the returns on all financial assets including stocks, bonds and financial derivatives; gain familiarity with the institutions and language of Wall Street to facilitate the development of an effective personal investment strategy; and understand and avoid the psychological biases that trip up many investors. The text will explain techniques for analyzing and valuing financial assets, their sources of risk, and how these risks may be managed.

Required Texts

Mayo, Herbert *Investments: An Introduction*, 10th edition, South-Western, Cengage Learning.
ISBN-13: 978-0-538-45209-0.

Web pages will be referenced throughout the term, contents of which you also will be responsible for.

Assessment & Grading Scale

Quizzes

Two (2) quizzes will be given during the term, covering material from the immediately previous and current class sessions. Format is objective, comprising multiple choice, true/false, matching, and short answer questions. Each quiz is worth 5% of your final course grade.

Final Exam

A final exam will be given during the term and is scheduled for the last class. The exam is cumulative, and will be structured with essay questions requiring thoughtful application of our studies to a real-world problem.

Homework Assignments

Assignments are due one week from issue. Late assignments will be accepted with penalties.

Discussion/Participation

Through on-line discussions and written responses to questions, you are strongly encouraged to learn to think through your own and others' experiences and insights within the context of our discussions. In short, you are encouraged to demonstrate your internalization of our material for application in the real world. In this context, you are not being evaluated for reaching "right"

conclusions, but for demonstrating your facility in forming arguments for any conclusions put, given the material we will cover in class. To give direct incentive to so engage, 10% of your mark for the course will be comprised of my assessment of your “classroom” participation during the term. The point is not to create undue angst, but to determine your active engagement with the material in the context of the class.

Grading

Final	20%
Quizzes	10%
Homework/problems/ Case studies/discussions	<u>70%</u>
Total	100%