

Brief Course Outline

Course Title: Investment strategies

Course Number and Section:

MOS

3316B 550

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Disclaimer: Information in the brief course outline is subject to change. The syllabus posted on OWL is the official and authoritative source of information for the course.

Course Description:

This course examines the major theories of investment finance and the pricing bonds, stocks and options. Portfolio construction using passive and active management strategies will be discussed. The course will appeal to anyone considering a career as a financial analyst, portfolio manager or in wealth management. It will also aid in preparing for the preliminary exams of various professional designations.

The first part of the course will cover the main tenets of mean variance portfolio theory to determine efficient portfolios and select the optimum portfolio.

The second part of the course will examine standard equilibrium pricing models such as the CAPM and the other equilibrium models.

Subsequently, the pricing of debt and equity instruments in their respective markets will be covered.

The course will conclude with an introduction to option pricing and other derivatives.

Although much attention is paid to the theoretical constructs of the material, we will throughout the course, place an emphasis on applications.

Learning Outcomes:

gain knowledge of the various types of financial instruments used in the financial industry.

evaluate the appropriate use of various portfolio construction techniques.

gain a fundamental understanding of the difference between investment and speculation.

get exposure to the technical skills needed to be a financial analyst.

Textbooks and Course Materials:

The main text for the course is Bodie Z., A. Kane, A.J. Marcus, S. Perrakis and P. Ryan, Investments, 10th Canadian edition McGraw Hill Ryerson (other versions are all fine).

Methods Of Evaluation:

Assignment	Due Date mm/dd/yy	Weight - %
Test		60%
Reports		30%

Assignment	Due Date mm/dd/yy	Weight - %
Participation		10%

In solidarity with the Anishinaabe, Haudenosaunee, Lūnaapéewak, and Chonnonton peoples on whose traditional treaty and unceded territories this course is shared.

Thursday, January 2, 2025