

To: Anne Clark

**INVESTMENTS MANAGEMENT, BA 55**  
**Course Outline**  
**Spring, 2007**

**Instructor:**

Paul O. Batson, III  
20 Washington Park  
Greenville, SC 29601

Phone Office: 235-6824  
Phone Home: 370-9194  
FAX: 232-5873  
EMAIL: [paul@batsontax.net](mailto:paul@batsontax.net)

**Book: Fundamentals of Investments**  
**Jordan and Miller, 4<sup>th</sup> Edition**

**Course Content and Objectives:**

This is an introductory course designed to explore the fundamentals of investing, but it is also designed to give the student "hands-on" capabilities in the investment markets. The course will include study of the US equities markets, the US bond markets, valuation techniques for equity and debt securities, analysis of financial data for investing, derivative products and their markets, and an introduction to mutual funds.

The major objective of the course is to arm the student with evaluative methods for measuring the worth and potential returns of investments. Additional objectives are to provide practical exercises that are based in reality, to provide the knowledge for research capability in collecting and analyzing data, and to give the student confidence in beginning or maintaining a portfolio.

As much as possible, the course will be conducted so as to provide a maximum of opportunities for the student to learn as much about the investment markets as is desired within the time frame of the course.

**Grading:**

<b>3 Quizzes</b>	<b>60%</b>
<b>Project</b>	<b>20%</b>
<b>Examination</b>	<b><u>20%</u></b>
<b>Total</b>	<b><u>100%</u></b>

## STUDY SCHEDULE

DATE	COVERAGE	CHAPTERS
01/09/07	The US Stock Markets	5
01/16/07	The Operations of the Markets	1
01/23/07	Buying & Selling Securities	2
01/30/07	<b>BEGIN STOCK-TRAK PROJECT</b> Security Types	3
<b>02/06/07</b>	<b>Quiz 1</b> Mutual Funds	<b>1,2,3,5</b> 4
02/13/07	Common Stock Valuation	6
02/20/07	Common Stock Valuation, continued	6
02/27/07	Market Behavior	7
03/06/07	Investor Psychology/Technical Analysis	8
<b>03/13/07</b>	<b>Quiz 2</b> Interest Rates	<b>4,6,7,8</b> 9
03/20/07	Interest Rates, continued Bond Prices & Yields	9 10
03/27/07	Corporate Bonds; Stock Options	18,15
04/03/07	<b>Quiz 3</b> <b>END STOCK TRACK-SUBMIT PROJECT</b>	<b>9,10, 15,18</b>
04/10/07	Government Bonds; Futures	14, 19
04/17/07	<b>FINAL EXAMINATION</b>	<b>Cumulative</b>