

**Economics 173AL Finance Lab****Fall 2013****Meetings 16:00 -16:50 MW****Wells Fargo Hall, Rady Campus****Michael Willoughby, Ph.D., CFA****Resources**

1. A Reading List (to be provided).
2. LIAR'S POKER, Michael Lewis.
3. ESSENTIALS OF INVESTMENTS, Bodie, Kane, & Marcus. Any edition.

**Course Objective:**

This course is an adjunct to Economics 173A, Financial Markets. We have three goals:

- (1) acquire a working professional vocabulary related to investment management;
- (2) learn critical issues in financial securities valuation,
- (3) improve Excel skills.

**Structure**

We will work with Excel® Spreadsheets, watch videos, hold discussions on previously assigned reading, and listen to a guest speaker on Wednesdays from October 2<sup>nd</sup> thru 9<sup>th</sup> week – pending speaker availability. The first three speakers are, in order: Edward Youn (Citi Group Investment Banking), Ross Locher (Brandes Investment Partners), Greg Kitt (Grow Patners).

**Grades**

Grades will be determined by individual performance across the following weighted assignments:

**Event/Assignment**

- a) Attendance for Speakers is important. I hope to see all registered students for each speaker, however things do come-up so, one absence will be excused. For a second or third absence, letter grades will be lowered by 1/3 letter, i.e. A to A-, A- to B+, etc.
- b) One 1-page written abstract of one assigned Speaker; 20 points +1 week
- c) Liar's Poker 20 M/C question quiz. 10 points 6<sup>th</sup> week
- d) One 6-8-slide PPT (file/print-out) presentation; 30 points any time
- e) Vocabulary exam based on readings & speakers; 40 points 10<sup>th</sup> week