

**Economics 173AL Finance Lab Fall 2014****Meetings 16:00 -16:50 Monday, Wednesday****Wells Fargo Hall, Rady Campus****Michael Willoughby, Ph.D., CFA****Resources**

1. ESSENTIALS OF INVESTMENTS, Bodie, Kane, & Marcus (any edition, pref. the 8<sup>th</sup>)
2. A Short Reading List (provided).
3. LIAR'S POKER, Michael Lewis.
4. A Laptop with Microsoft Excel®

**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) explore a couple of critical, current 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 as often as scheduling permits.

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

**Event/Assignments.**

- a) **Attendance** for Speakers is important. I expect to see all registered students for each speaker. Let me know in-advance if you must miss a speaker. 20 percent each of the course grade.
- b) A one page **Summary** of any one speaker's presentation. 20 percent of the course grade.
- c) Liar's Poker multiple choice **Quiz** – 5 percent of the course grade.
- d) A **Critical Review** of the UCSD CFA Investment Challenge Stock Research Report on Callaway (symbol "ELY") Golf. Written; 3 pages max. 55 percent of the course grade

**Or**

- e) An **Excel workbook** w/ one worksheet designed to analyze any aspect of finance or valuation in a user-friendly and visually attractive approach. 55 percent of the course grade.