

Professor

Name	Phone number	Office	Email
Yunke He, PhD, CFA	762-5445 #4368	Kelowna C143	yhe@okanagan.bc.ca

Evaluation Procedure

Option 1	
Investment Practice	30%
Quizzes	20%
Exams	50%
Total	100%
Option 2	
Securities Analysis	30%
Quizzes	20%
Exams	50%
Total	100%
Option 3	
Quizzes	20%
Exams	80%
Total	100%

Notes

Course Schedule

Date		Topic	Textbook
		Tues., Jan. 3 Mon., Feb. 13 Tues., Feb. 14 to Fri., Feb. 17, Mon., Apr. 10 Wed., Apr. 12 to Wed., Apr. 26 Fri., Apr. 14 to Mon., Apr. 17	
Jan	4, 6	Asset Allocation	Ch 2
	11, 13	Analysis of Financial Statements	Ch 10
	18, 20	An Introduction to Security Valuation	Ch 11
	25, 27	Microanalysis and Micro valuation of the Stock Market	Ch 12
Feb	1, 3	Exam #1 Industry Analysis	Ch 13
	8, 10	Industry Analysis (continued) Company Analysis and Stock Valuation	Ch 13 Ch 14
	22, 24	Company Analysis and Stock Valuation (continued)	Ch 14
Mar	1, 3	Technical Analysis	Ch 15
	8, 10	Equity Investment Strategies	Ch 16
	15, 17	Exam #2 Bond Portfolio Strategies	Ch 19
	22, 24	Bond Portfolio Strategies (continued) Evaluation of Portfolio Performance	Ch 19 Ch 25
	29, 31	Professional Money Management, Alternative Assets, and Industry Ethics Code of Ethics and Standards of Professional Conduct Exam #3	Ch 24 Appendix B
Apr	5, 7	Investment and Securities Analysis Reports Due Investment and Securities Analysis Presentations	

This schedule is subject to change at the discretion of the instructor.

