

# Business Administration

Course Number: **BUAD 450**

Course Title: **INVESTMENT MANAGEMENT**

Credits: 3

Calendar Description: In this course students will gain the knowledge and skills required for success as an investment professional or an individual investor. Topics include investment and portfolio theory, techniques for security analysis (fundamental and technical), valuation and management of various investment products, international investing, and portfolio management and performance evaluation. Careers and ethics in investment management will be discussed.

Semester and Year: **FALL 2023**

Prerequisite(s): BUAD 350, and third-year standing

8.8 reW nBT-0.005 Tc 0.00



**Professor**

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| <b>Elena Mitropolsky</b><br><i>Course Captain</i> | <b>C143</b> | <b>emitropolsky@okanagan.bc.ca</b> |

**Learning Outcomes**

Upon completion of this course students will be able we 9owlFm43

recommendation in a short research note. If you are an OCSIF member, you will be pitching your bond/pref to the fund as a potential investment.

**Group Project – Stock Analysis and Valuation**

Each team will be assigned a publicly traded company to perform in-depth analysis and valuation for portfolio investment purposes. The deliverables include a sell-side investment report and presentation to the class, and an Excel model to be submitted and used during presentation

**Required Texts/Resources**

Required:

1. Investment Analysis and Portfolio Management, Reilly, Brown, Leeds, 11th Edition, Nelson Education, 2019
2. Valuation, 7<sup>th</sup> edition, Measuring and Managing the Value of Companies, Koller, Goedhart, Wessels, McKinsey and Company, Wiley

**A free e-book** is also available through the Library  
VALUATION: MEASURING AND MANAGING THE VALUE OF COM  
Link:

Course Schedule

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| <p>2023<br/>Week of:</p> | <p>5 (Feb 6) 4 (Sep 1) 6 (Oct 1) 5 (Nov 1) 14.2 (bTw 9.12 t)-3 ( 0.0(day)23.3 (</p> |
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