

MGMT 154 Investment Management and Strategies
 Matthew C. McCabe
 689-7256 Work
 224-1181 Cel

Wells College
 mmccabe@wells.edu
 mmccabenmc@verizon.net

Textbooks: Standard & Poor's Guide to Money & Investing; The Wall Street Journal Complete Money & Investing Guidebook; Barron's Finance and Investment Handbook; The Psychology of Investing, by John R. Nofsinger

<u>Dates</u>	<u>Chapter</u>	<u>Topics</u>	<u>Assignments</u>
1/30	Buying & Selling Stocks	Long & Short Purchases and Sales, Margin Purchases, Leverage	<u>Standard and Poor's Guide</u> pp. 60-67, <u>Wall Street Journal Guidebook</u> pp. 52-65.
2/6	Introduction to Bonds	Bond Basics, Basics of Income Producing Securities	<u>Standard and Poor's Guide</u> pp. 68-73, <u>Wall Street Journal Guidebook</u> pp. 71-78, <u>Finance and Investment Handbook</u> Sections: Money Market Fund (pp. 41-43), Treasury Securities (pp. 78-81), Government Agency Security (pp. 36-38), Corporate Bond (pp. 11-14), Zero Coupon Bond (pp. 83-86), Municipal Security (pp. 46-49).
2/13	Bond Ratings and Types	Securitization, Bond Ratings, Bond Varieties	<u>Standard and Poor's Guide</u> pp. 74-87, <u>Wall Street Journal Guidebook</u> pp. 79-88, <u>Finance and Investment Handbook</u> Sections Mortgage Backed Security (pp. 43-46).
2/20	Bond Features, Indices	Bond Features, Bond Purchases and Sales, Measuring Performance with Indices	<u>Standard and Poor's Guide</u> pp. 88-101.
2/27	Mutual Funds, Take Home Exam	Mutual Fund Basics Take Home Exam: Long & Short Purchases and Sales, Margin, Leverage, and Bonds	<u>Standard and Poor's Guide</u> pp. 116-127, <u>Wall Street Journal Guidebook</u> pp. 137-143, <u>Finance and Investment Handbook</u> Sections: Mutual Fund (pp. 49-53), Closed End Funds (pp. 14-16), Exchange Traded Funds (pp. 24-26), Unit Investment Trusts (pp. 81-83).
3/5	Mutual Fund Fees & Performance	Mutual Fund Fees, Evaluating Mutual Fund Performance	<u>Standard and Poor's Guide</u> pp. 128-137, <u>Wall Street Journal Guidebook</u> pp. 144-153.

<u>Dates</u>	<u>Chapter</u>	<u>Topics</u>	<u>Assignments</u>
3/12	Options & Following Stocks	Introduction to Options, Assignment of Stocks to Follow	<u>Standard and Poor's Guide</u> pp. 138-145, <u>Wall Street Journal Guidebook</u> pp. 178-182, <u>Finance and Investment Handbook</u> Section: Options (pp. 53-63).
3/19	Spring Break	No Class: Spring Break	.
3/26	Options, Report on Stocks Take Home Exam	More on Options, Report on Assigned Stocks Take Home Exam: Mutual Funds, Options	<u>Standard and Poor's Guide</u> pp. 146-157, <u>Wall Street Journal Guidebook</u> pp. 182-183
4/2	Futures	Introduction to Futures, Report on Assigned Stocks	<u>Standard and Poor's Guide</u> pp. 158-167, <u>Wall Street Journal Guidebook</u> pp. 173-178, <u>Finance and Investment Handbook</u> Section: Futures (pp. 30-35).
4/9	Futures	More on Futures, Report on Assigned Stocks	<u>Standard and Poor's Guide</u> pp. 168-175.
4/16	Alternative Investments and Hedge Funds	Alternative Investments, Report on Assigned Stocks	<u>Standard and Poor's Guide</u> pp. 176-183, <u>Wall Street Journal Guidebook</u> pp. 166-172.
4/23	Real Estate Investing	Real Estate Investments, Report on Assigned Stocks	<u>Standard and Poor's Guide</u> pp. 184-185, <u>Wall Street Journal Guidebook</u> pp. 189-199, <u>Finance and Investment Handbook</u> Sections: Real Estate (pp. 72-74), Real Estate Investment Trusts (pp. 69-72).
4/30	The Psychology of Investing	Nofsinger Chapters 1 & 2, Report on Assigned Stocks	Nofsinger Chapters 1 & 2.
5/7	The Psychology of Investing	Nofsinger Chapters 3 & 4, Report on Assigned Stocks	Nofsinger Chapters 3 & 4.

**Final Exam Take Home Final: Due by
Evaluations 5/14. Exams can be emailed,
sent by campus mail, or
mailed to my home (P.O. Box
921, Jordan, NY
13080-0921).
Evaluation Forms.**

Grading: Test 1: 20%
Test 2: 20%
Class Participation/Assignments: 30%
Final Exam: 30%

Notes: 1) Please read the assigned pages. Additional written assignments may be required.
2) My office is in Macmillan 304A, which is off the Social Sciences Lab (312). I share this space with two other Instructors. To get to Macmillan 304A, you need to walk down to the end of the hall in the North end of Macmillan and then proceed into and through room 312. At this point, I have no specific office hours, however, you can always e-mail me with any questions or to set up a time to meet