Special Topics: Equity Analysis – FINN 3000-090  
Spring 2019 – Friday Building 144  
Wednesday – 5:30-8:15 PM

Professor: Judson W. Russell, Ph.D., CFA  
Office: Friday Building – 350C  
Phone: 704-687-7618  
Email: jrussell@uncc.edu

Office hours: Tues/Thurs 2-3pm. I encourage you to meet with me, by appointment, to discuss the course or other areas of interest. We can meet after class or at other times which are mutually available.

Textbook Details:  
**PSYCHOLOGY OF INVESTING | Edition: 6TH**  
Author: NOFSINGER  
ISBN: 9780415397575

Objectives: In this course we will discuss methods and techniques for analyzing equities. The course is centered on three areas of analysis fundamental, technical, and behavioral. As a special topic course, we are most interested in practical application of course material and therefore assignments require a fair amount of out-of-class time to complete. An introduction to R programming is included in the course.

Participation: Your participation will improve the experience for yourself and others in the class. **Exams are offered only on the dates on this syllabus.** If you foresee any conflicts with this schedule, you will want to withdrawal from this course to avoid adverse impact to GPA.

Absences from Quizzes/Examinations.  
There will be no **makeup or early examinations of any sort.** The Final Examination must be taken at the scheduled date and time. If you cannot take the Final Examination for medical reasons, you will be awarded an “I” and can complete the course requirements the following semester. **If you miss the midterm that will count as zero.**

Assignments and Lectures  
The principal method of instruction will be primarily by means of lectures. Students will be expected to actively participate in classroom discussions and the solving of problems. You should be prepared for class by reading the assigned chapters, before the class meets. Solving problems, reading the textbook and participating in classroom discussions are ways in which you can work to improve your understanding of the course material.
Assignments and Grading:

You will be graded on your performance on the midterm and final exams.

I follow a scale of:

- 90-100 A
- 80-89 B
- 70-79 C, etc.

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<thead>
<tr>
<th>Assignment</th>
<th>Points</th>
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<tbody>
<tr>
<td>‘Psychology of Investing’ Presentation (1 @ 50) - Group</td>
<td>50 points</td>
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<tr>
<td>Case Analysis (2 @ 50) - Group</td>
<td>100 points</td>
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<tr>
<td>Bloomberg/R Quizzes (4 @ 25 each) – Individual</td>
<td>100 points</td>
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<tr>
<td>Project Assignment (1 @ 50) – Group</td>
<td>50 points</td>
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<tr>
<td>Midterm Exam - Individual</td>
<td>100 points</td>
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<tr>
<td>Final Exam - Individual</td>
<td>100 points</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>500 points</strong></td>
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Students are expected to have a single, non-programmable financial calculator to assist them in solving assigned problems. Make sure that you know how to use your calculator as calculator use is your responsibility. You’ll also need to know Excel in order to do some of the financial modeling in this course and be open to learning R programming language. Since the field of investments is a dynamic and constantly changing area students are expected to keep abreast of current events in financial markets. This can be achieved by reading the Wall Street Journal, Business Week or Economist, which are all good sources for current information.

Academic Integrity

Students are advised to apprise themselves of, and adhere to the rules specified in the UNC-Charlotte code of student integrity regulations, which will be strictly enforced in this class.

Diversity Statement

The Belk College of Business strives to create an inclusive academic climate in which the dignity of all individuals is respected and maintained. Therefore, we celebrate diversity that includes, but is not limited to ability/disability, age, culture, ethnicity, gender, language, race, religion, sexual orientation, and socio-economic status.

Disability Accommodations

UNC Charlotte is committed to access to education. If you have a disability and need academic accommodations, please provide a letter of accommodation from Disability Services early in the semester. For more information on accommodations, contact the Office of Disability Services at 704-687-0040 or visit their office in Fretwell 230.
<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Reading &amp; Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan 9</td>
<td>Lecture: Course Structure and Introduction</td>
<td>Assignment: Download R from <a href="https://www.r-project.org/">https://www.r-project.org/</a> and follow the instructions for Windows or Mac users. Download and install RStudio from <a href="https://www.rstudio.com/products/rstudio/download2/">https://www.rstudio.com/products/rstudio/download2/</a></td>
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<tr>
<td>Jan 16</td>
<td>Lecture: Key elements of Bloomberg</td>
<td>Assignment: Bloomberg worksheet and R assignment</td>
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<tr>
<td>Jan 23</td>
<td><strong>Presentation:</strong> Group 1 – Chapter 1 Psychology and Finance</td>
<td>Assignment: Bloomberg worksheet and R assignment</td>
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<td>Jan 30</td>
<td><strong>Bloomberg and R Quiz 1</strong></td>
<td>Assignment: Bloomberg worksheet and R assignment</td>
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<td>Feb 6</td>
<td><strong>Case 1 Due</strong></td>
<td>Assignment: Bloomberg worksheet and R assignment</td>
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<td>Feb 13</td>
<td><strong>Assign Project</strong></td>
<td>Assignment: Bloomberg worksheet and R assignment</td>
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<td>Feb 20</td>
<td><strong>Presentation:</strong> Group 5 – Chapter 5 Decision Frames</td>
<td>Assignment: Bloomberg worksheet and R assignment</td>
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<td>Feb 27</td>
<td><strong>Midterm Exam Due</strong></td>
<td>Assignment: Bloomberg worksheet and R assignment</td>
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<td>Mar 6</td>
<td>Spring Break</td>
<td>Assignment: Bloomberg worksheet and R assignment</td>
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<td>Mar 13</td>
<td><strong>Presentation:</strong> Group 6 – Chapter 6 Mental Accounting</td>
<td>Assignment: Bloomberg worksheet and R assignment</td>
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<td>Mar 20</td>
<td><strong>Bloomberg and R Quiz 3</strong></td>
<td>Assignment: Bloomberg worksheet and R assignment</td>
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<td>Mar 27</td>
<td><strong>Presentation:</strong> Group 8 – Chapter 8 Representativeness &amp; Familiarity</td>
<td>Assignment: Bloomberg worksheet and R assignment</td>
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<td>Apr 3</td>
<td><strong>Case 2 Due,</strong></td>
<td>Assignment: Bloomberg worksheet and R assignment</td>
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<td>Apr 10</td>
<td><strong>Bloomberg and R Quiz 4</strong></td>
<td>Assignment: Bloomberg worksheet and R assignment</td>
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<td>Apr 17</td>
<td><strong>Project Due</strong></td>
<td>Assignment: Bloomberg worksheet and R assignment</td>
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<td>Apr 24</td>
<td>Lecture: Equity Valuation Workshop 3</td>
<td>Assignment: Prepare for Final</td>
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<td>May 1</td>
<td>Reading Day</td>
<td>Assignment: RStudio from <a href="https://www.rstudio.com/products/rstudio/download2/">https://www.rstudio.com/products/rstudio/download2/</a></td>
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<tr>
<td>May 8</td>
<td>Final Exam 5:00-7:30 PM - Comprehensive</td>
<td>Assignment: RStudio from <a href="https://www.rstudio.com/products/rstudio/download2/">https://www.rstudio.com/products/rstudio/download2/</a></td>
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