

FNCE 3498 Summer 2020 Course Schedule TENTATIVE

Date	Topic	Homework assignments (all homework assignments are due before class starts)
Week 1 Monday (June 29)	Review of Fundamentals of Finance – Key concepts: time value of money, annuity, perpetuity, bond valuation, stock valuation, estimating free cash flows, risk and return, cost of capital Overview of the course - logistics Bloomberg access instructions	Review notes from FNCE 3400 on these topics.
Week 1 Thursday (July 2)	Topic 1: Investment philosophy – value and growth investing Overview of Bloomberg and functions. Topic 2: EQS - Equity screening tool	HW 1 due – readings on investment philosophy
Week 2 Monday (July 6)	Topic 3: Company research in Bloomberg	HW 2 due – equity screening
Week 2 Thursday (July 9)	Topic 4: Industry research in Bloomberg	HW 3 due – company research assignment
Week 3 Monday (July 13)	Topic 5: Valuation: macro effects	HW 4 due – industry research assignment
Week 3 Thursday (July 16)	Topic 6: Valuation: discounted cash flows	HW 5 due – Macro drivers of stock price
Week 4 Monday (July 20)	Topic 7: The Yield Curve: What is it and why does it matter to equity valuation	HW 6
Week 4 Thursday (July 23)	Topic 8: Valuation: public comparables/ Technical analysis	HW 7
Week 5 Monday (July 27)	Topic 9: Financial analysis/ Capital structure/ Debt profile	HW 8
Week 5 Thursday (July 30)	Topic 10: Earnings history/Analyst recommendations Topic 11: Ownership trends and short interest	HW 9 BMC “Core Concepts” Certificate due July 31 st

Week 6 Monday (August 3)	Equity research presentations	Slides are due before presentation
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August 7 th , 2020	Final equity research reports due
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Last day to add or drop a class without a grade of W is July 6.

Last day to withdraw from classes or apply for Credit/No Credit grading is July 24.