



Professor

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

Learning Outcomes

Upon completion of this course students will be able to

formulate Investment Policy Statement and make asset allocation decisions for individual and institutional investors.

apply the valuation theory to a range of investments.

apply macro-analysis and micro-valuation of the stock market; conduct industry analysis, company analysis, and stock valuation.

apply technical analysis in stock and bond valuation.

formulate equity portfolio management strategies.

formulate bond portfolio management strategies.

evaluate equity and bond portfolios with various techniques.

Course Objectives

This course will cover the following content:

*See weekly schedule.

Course Schedule

Date		Topic	Textbook
		Tues. Sept 8 College-wide Orientation Day Wed. Sept 9 Classes begin Mon. Oct 12 Thanksgiving Day – no classes Wed. Nov 11 Remembrance Day – no classes Thur. Dec 10 Last day of regularly scheduled classes	
Sept	11	Asset Allocation	Ch 2
	18	Analysis of Financial Statements	Ch 10
	25	An Introduction to Security Valuation	Ch 11



