

COURSE GOALS

The course introduces MBA students to finance fundamentals with an emphasis on the basics of quantifying the value of projects and companies.

LEARNING OBJECTIVES

Students who successfully complete the course will have an ability to quantitatively evaluate the financial benefits associated with personal and corporate real investment decisions. Students will also have a basic understanding of the functioning of capital markets and the determinants of discount rates.

ASSESSMENT SUMMARY

<i>Completion of Bloomberg Market Concepts</i>	<i>10%</i>
<i>In-class Group Presentation</i>	<i>10%</i>
<i>Bi-Weekly Pearson MyLab Finance Quizzes</i>	<i>40%</i>
<i>Final Exam</i>	<i>40%</i>

SUBMISSION INFORMATION – Pearson MyLab Finance

Quizzes (and practice problems) are to be accessed through www.pearson.com/mylab (see access instructions on Page 5 below)

COURSE INFORMATION

Division: Finance

Term/period: Period 2

Instructor: Murray Carlson

Email: murray.carlson@sauder.ubc.ca

Phone: 604-822-8358

Office hours: By Appointment

Section number: 001

Class meeting times: M, W: 8-10

Course duration: Oct 29 – Dec 8 (Exam week Dec 3-8)

Classroom location: HA 132

COURSE MATERIALS & REQUIREMENTS

Reading Materials: *Berk, DeMarzo, and Stangeland, Corporate Finance, Third Canadian Edition, 2015, with myFinanceLab. REQUIRED*

Technology Requirements: *A laptop computer that runs Excel*

SCHEDULE

WEEK #	CLASS TOPICS	ACTIVITIES / READINGS	WHAT'S DUE
Pre-course Preparation	Self study – Bloomberg Introduction and Economic Indicators	Bloomberg Market Concepts (see instruction sheet below)	Create Bloomberg Account BMC Introduction BMC Economic Indicators
WEEK 1	Introduction to finance and time value of money	Chapters 1-4	
WEEK 2	Interest rates and introduction to bonds	Chapters 5-6	Chapter 4-5 Quiz (Nov 18)
WEEK 3	Valuing bonds and stocks	Chapter 6-7	
WEEK 4	Valuing bonds and stocks	Chapter 6-7	Chapter 6-7 Quiz (Dec 2)
WEEK 5	Investment decision rules and capital budgeting	Chapters 8	
EXAM			Final Comprehensive Exam

ACADEMIC INTEGRITY AND PLAGIARISM

Academic honesty is essential to the continued functioning of the University of British Columbia as an institution of higher learning and research. All UBC students are expected to behave as honest and responsible members of an academic community. Breach of those expectations or failure to follow the appropriate policies, principles, rules, and guidelines of the University with respect to academic honesty may result in disciplinary action.

It is the student's obligation to inform him or herself of the applicable standards for academic honesty. These standards can be viewed in full at

<http://www.calendar.ubc.ca/vancouver/index.cfm?tree=3,54,111,959>.

BAFI 500 – 001: Bloomberg Training

Bloomberg is an essential tool in financial markets and for many financial services careers. It provides market data on government bonds, corporate bonds, equities and many other types of securities as well as news. The goal of this project is to familiarize yourself with Bloomberg and to obtain a Bloomberg certification.

This assignment requires you to complete the Bloomberg Market Concepts course. You are recommended to get started on your Bloomberg Market Concepts as early as possible. If you wait until the last minute, all Bloomberg terminals might be taken. Sauder has a total of ten Bloomberg terminals with nine of them bookable. Please book Bloomberg terminals through <http://booking.sauder.ubc.ca>. You may book the machines for at most two hours at a time.

This Bloomberg Assignment counts for 10% of your overall course grade. If you complete all the modules before the following deadlines, the assignment grade will be 100%. If, for whatever reason, you were late for completing any part of the Bloomberg Assignment or you did not complete all tasks by the due date, you will receive a grade of 0%. You are expected to complete all the modules on your own.

Module	Deadline
Complete Module: Economic Indicators	11pm on November 4 th , 2018
Complete Module: Currencies	11pm on November 11 st , 2018
Complete Module: Fixed Income	11pm on November 18 th , 2018
Complete Module: Equities	11pm on November 25 th , 2018

BLOOMBERG FACILITIES AND OFFICE HOURS

Sauder has five Bloomberg terminals in the Wayne Deans Investment Analysis Centre (HA238) and five Bloomberg terminals in the Leith Wheeler Investment Research Lab (CLC222). The library has kindly agreed to schedule office hours in the Wayne Deans Center throughout the term. These office hours will be a primary and valuable resource if you have technical difficulties with accessing or using the Bloomberg terminals. You should turn to these office hours if you have technical issues.

Wayne Deans Investment Analysis Center Office Hours: (September 17 – November 30)

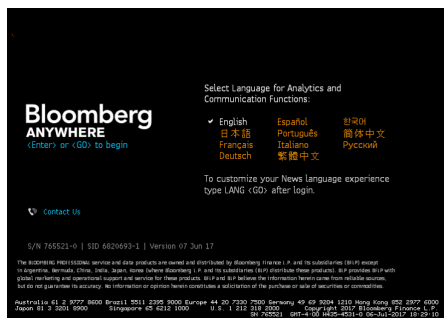
Monday 11am - 1pm & 230pm - 4pm
Wednesday 10am - 1 pm
Thursday 130pm - 5pm

<https://mybcom.sauder.ubc.ca/specialized-learning-spaces/wayne-deans-investment-analysis-centre>

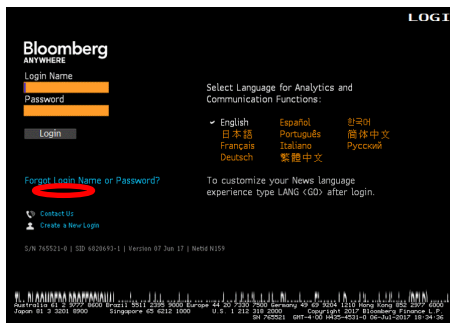
You may also contact Fei Song, the Investment Labs Coordinator, at fei.song@sauder.ubc.ca

Logging on Instructions

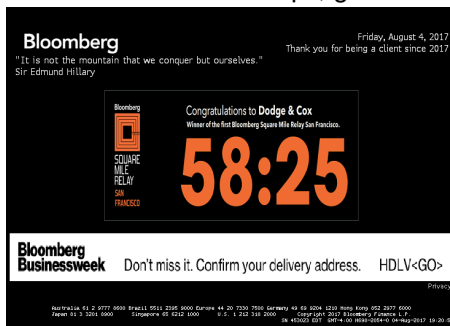
1. Login to any Bloomberg terminal in either of the labs using your CWL
2. Double click Bloomberg Icon on the Desktop
3. Hit “Enter or Go”



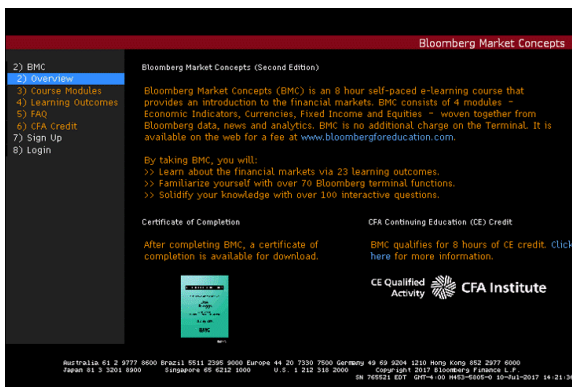
4. Click on “Create a New Login”



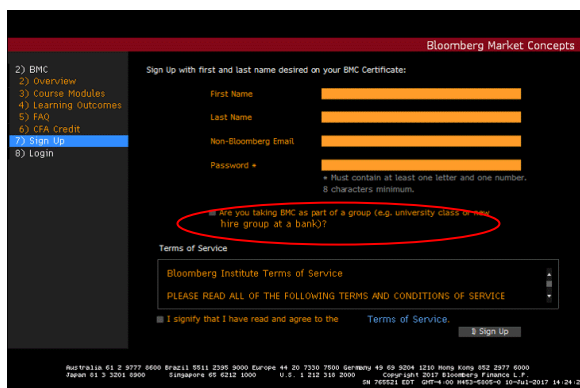
5. Follow the on-screen steps, get to home page:



6. Type “BMC” on command line and hit “GO”



7. Click on “Sign Up”. See screen below then follow instructions. Please enter your assigned class code at this step - **5CJWRKLD7F**



BAFI 500 – Pearson MyLab Finance Instructions

To register for BAFI 500 (Introductory Finance) - 2018 - 001:

1. Go to www.pearson.com/mylab .
2. Under Register, select **Student** .
3. Confirm you have the information needed, then select **OK! Register now** .
4. Enter your instructor's course ID: **carlson26298** , and **Continue** .
5. Enter your existing Pearson account **username** and **password** to **Sign In** .

You have an account if you have ever used a MyLab or Mastering product.

» If you don't have an account, select **Create** and complete the required fields.

6. Select an access option.

» Enter the access code that came with your textbook or that you purchased separately from the bookstore.

» If available for your course,

• Buy access using a credit card or PayPal. • Get temporary access.

7. From the You're Done! page, select **Go To My Courses** .
8. On the My Courses page, select the course name **BAFI 500 (Introductory Finance) - 2018 - 001** to start your work.

To sign in later:

1. Go to www.pearson.com/mylab .
2. Select **Sign In** .
3. Enter your Pearson account **username** and **password**, and **Sign In** .
4. Select the course name **BAFI 500 (Introductory Finance) - 2018 - 001** to start your work.

To upgrade temporary access to full access:

1. Go to www.pearson.com/mylab .
2. Select **Sign In** .
3. Enter your Pearson account **username** and **password**, and **Sign In** .
4. Select **Upgrade access** for **BAFI 500 (Introductory Finance) - 2018 - 001** .
5. Enter an access code or buy access with a credit card or PayPal.