Grading of Assignments | % of Overall grade
--- | ---
**GROUP PROJECTS**
Final Company Analysis | 20%

**INDIVIDUAL PROJECTS**
Midterm In class Essay Exam | 15%
Buffett Return Analysis | 5%
Restaurant modeling Case | 8%
Isaac Mizrahi modeling Case | 8%
Company Financial Analysis Discussion | 8%
Price Target Recommendation (ANF) | 8%
Portfolio Analysis Assignment | 8%
Outline Notes of Readings | 10%
Class Participation | 10%

**Weekly Assignments**

**Tues, August 27**
**Introduction**

**Tues, September 2**
**Financial Statements and Analysis**

*Readings*
- 13d
- HBR Guide to Finance
- Note on Financial Analysis
- Financial Statement Analysis

*Assignments*
- Outline Notes of Readings
- Restaurant modeling Case
- Groups will be assigned for Final project

**Tues, September 9**
**Valuing Companies**

*Readings*
- Warren Buffett and the Interpretation of Financial Statements, Buffett
- Valuation Techniques
- Balance Scorecard
- Basic Ratio Analysis and Equity valuation

*Assignments*
- Review of Buffett Book
- Isaac Mizrahi modeling Case
- Choose Company for Final Project

**Tues, September 16**
**Recent Events in the Markets**

- Where to invest Globally in a Low Return Environment

**Tues, September 23**
**The Stock Market, Investing, and Behavioral Finance**

*Readings*
- 13d
- Psychology of Investing, Nofsinger
- Little Book of Behavioral Investing, Montier

*Assignments*
- Review of books
<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Readings</th>
<th>Assignments</th>
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<tbody>
<tr>
<td>Tues, Sept 30</td>
<td>Wall Street Legends (1)</td>
<td>13d</td>
<td>Lessons from the Legends of Wall Street, Nikki Ross</td>
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<td>Soros Lectures, George Soros</td>
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<td>Review of books</td>
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<td>Company Valuation Assignment (ANF)</td>
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<td>Tues, October 7</td>
<td>Wall Street Legends (2)</td>
<td>13d</td>
<td>Mid Term Exam - Essay</td>
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<td>Company Financial Analysis Discussion</td>
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<td>Tues, October 14</td>
<td>No Class – Fall Break</td>
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<td>Tues, October 21</td>
<td>Investing &amp; Portfolio (1)</td>
<td>13d</td>
<td>The Little Book That Beats the Market, Joel Greenblatt</td>
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<td>The Big Secret for the Small Investor, Joel Greenblatt</td>
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<td>Outline Notes on Greenblatt</td>
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<td>Tues, October 28</td>
<td>Investing &amp; Portfolio (2)</td>
<td>13d</td>
<td>Elements of Investing, Malkiel, Ellis</td>
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<td>Unconventional Success, David Swensen</td>
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<td>Portfolio Analysis Assignment</td>
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<td>Outline Notes on Swensen</td>
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<td>Outline Notes on Malkiel</td>
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<td>Tues, November 4</td>
<td>Current Markets &amp; the Fed</td>
<td>13d</td>
<td>Federal Reserve System: Purposes &amp; Functions</td>
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<td>Essays on the Federal Reserve, Ben Bernanke</td>
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<td>Outline Notes on Bernanke</td>
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<td>Tues, November 11</td>
<td>Energy, Commodities &amp; the markets</td>
<td>13d</td>
<td>Fisher Investments in Energy, Ken Fisher</td>
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<td>Review Westport innovations</td>
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<td>Outline Notes on Fisher</td>
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<td>Tues, November 18</td>
<td>Emerging Markets &amp; Investing</td>
<td>13d</td>
<td>Emerging Markets, Mark Mobius</td>
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<td>Tues, November 25</td>
<td>No class ; Night before Thanksgiving Break</td>
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<td>Tues, December 2</td>
<td>Presentations</td>
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<td>Hand In Company Analysis Papers / Presentations</td>
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<td>Final Exam</td>
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Books to Order:
- Warren Buffett and the Interpretation of Financial Statements, Buffett
  - ISBN #1416573186
- The Little Book That Beats the Market, Joel Greenblatt
  - ISBN #0470624159
- The Big Secret for the Small Investor, Joel Greenblatt
  - ASIN: B00DIKZK0E
- The Little Book of Emerging Markets, Mark Mobius
  - ISBN #1118153812
- Fisher Investments on Energy, Ken Fisher
  - ISBN #0470285435
- Psychology of Investing, John Nofsinger
  - ISBN #0132994895
- Little Book of Behavioral Investing, James Montier
  - ISBN #0470686022
- Lessons from the Legends of Wall Street, Nikki Ross
  - ISBN #0793137152
- The Soros Lectures, George Soros
  - ISBN #1586488856
- Pioneering Portfolio Management, David Swensen
  - ISBN #1416544690
- Federal Reserve System: Purposes & Functions
  - ISBN #1304100030
- Federal Reserve and the Financial Crisis, Bernanke
  - ISBN #0691158738

Readings on Sakai Website in pdf
- Course Website: HBR Guide to Finance
- Course Website: Note on Financial Analysis
- Course Website: Financial Statement Analysis
- Course Website: Financial Statement and Ratio Analysis
- Course Website: Valuation Techniques
- Course Website: Balance Scorecard
- Course Website: Basic Ratio Analysis and Equity valuation
- Course Website: 13D (weekly)