Course Description

Fin 341 is a practicum where students manage a portfolio of stocks and bonds funded by an internal or external sponsor. Investment teams may compete against local universities to invest funds for the Chartered Financial Analyst Society of Orange County or other investment-related entity.

Course Objectives/Goals

This course is constructed as a ‘high impact practice’ giving students the opportunity to apply accounting, economics, statistics, investment theory, and valuation concepts covered in many MCBE core courses.

Students will be able to:

• Distinguish between the risk and return characteristics of various stocks and bonds.
• Interpret financial market responses to economic, political, or environmental events as rational or ‘noise’.
• Develop the ability to write clear, concise, accurate investment and economic reports.

The Student Managed Investment Fund is open to undergraduate and graduate students from any major or concentration. This 1-unit course may be repeated for credit up to 3 times.

Prerequisite: FIN 320

FIN 320 Prerequisite can be waived upon request.