

BRITISH COLUMBIA INSTITUTE OF TECHNOLOGY

COURSE OUTLINE

COURSE NAME Investments and Banking

COURSE NUMBER FMGT 4530 / 31

DATE January, 1995

Charles Priester

Prepared by FCBA, B. Comm, MA (Econ)

Taught to 2nd Year, 2nd Term

School Business

School Business

Program Financial Management

Program Financial Management

Date Prepared December, 1994

Option Investment Management

Term 4 Hrs/Wk 4 Credits 4

No. of Weeks 9 Total Hours 36

Instructor(s) C.L. Priester Office SE6- Local 6751

Office Hours To Be Posted on Office Door

PREREQUISITES

Successful completion of the first 3 terms of the Financial Management Program.

COURSE OBJECTIVES

(Upon successful completion of this course, the student will be able to:)

The course aims to make the student familiar with the changing nature of the investment and banking industry, the growing internationalization and integration of many aspects of the investment and banking business, and the new products and services that are being created by the industries to serve the needs of business better.

EVALUATION

Two Tests or Quizzes	<u>60</u>	<u>%</u>
Two Projects	<u>40</u>	<u>%</u>
Total	<u>100</u>	<u>%</u>

REQUIRED TEXT(S) AND EQUIPMENT

A list of required readings shall be issued to the student at the beginning of the course.

Most readings will be distributed to the student. Although, reference material available in the library may be assigned reading.

In addition, the student is obliged to obtain a subscription to the weekly "Financial Post of Canada".

Material from this periodical is an integral part of the course material and will form part of the evaluation process.

CHEATING

Acts of cheating, plagiarism and dishonesty are not tolerated; the degree of punitive action may range from a written warning to withdrawal from the program. These penalties may also be applied to students who knowingly contribute to the act of dishonesty, cheating and plagiarism. (Refer to pages 1 and 2 of the current calendar.)

REFERENCE TEXTS AND RECOMMENDED EQUIPMENT

Managerial Finance in a Canadian Setting

By Peter Lusztig and Bernard Schwab

Butterworth & Co. Ltd., Scarborough, Ontario

Fifth Edition

COURSE SUMMARY

This course will deal with four aspects of investment and banking.

1. The capital and money markets in Canada and abroad. A look at the changing character and growing integration of capital and money markets.
2. Recent trends and developments in corporate asset and Liability Risk Management, i.e., risk deduction techniques that deal with foreign currency and interest rate fluctuations.
3. An overview of recent trends and developments in the design of financial investments among which equity-linked debt investments, Eurocurrency issues, financial hybrids to raise funds for corporations.

COURSE OUTLINE
(continued)

Week	Material Covered
1	The Capital and Money Markets in Canada and Abroad — Cross Border Finance Trends
2	The Capital and Money Markets in Canada and Abroad
3	Asset and Liability Risk Management Techniques
4	Asset and Liability Risk Management Techniques
5	Asset and Liability Risk Management Techniques
6	Recent Developments in the Design of Financial Investments, Equity-Linked Issues, Option-Related Issues. Eurocurrency Paper and Hybrids
7	Recent Developments in the Design of Financial Investments, Equity-Linked Issues, Option-Related Issues. Eurocurrency Paper and Hybrids
8	Recent Developments in the Design of Financial Investments, Equity-Linked Issues, Option-Related Issues. Eurocurrency Paper and Hybrids
9	REVIEW and FINAL EXAM