

UGBA 98/198

Introduction to Investment

Spring 2009



Enrollment

Application Essay

- Must be e-mailed within 48hrs
- **j.wei@berkeley.edu**
- NO exceptions

Class Size

- Class size is limited to 40 students
- Strong curiosity about investing
a MUST

Essay Prompt

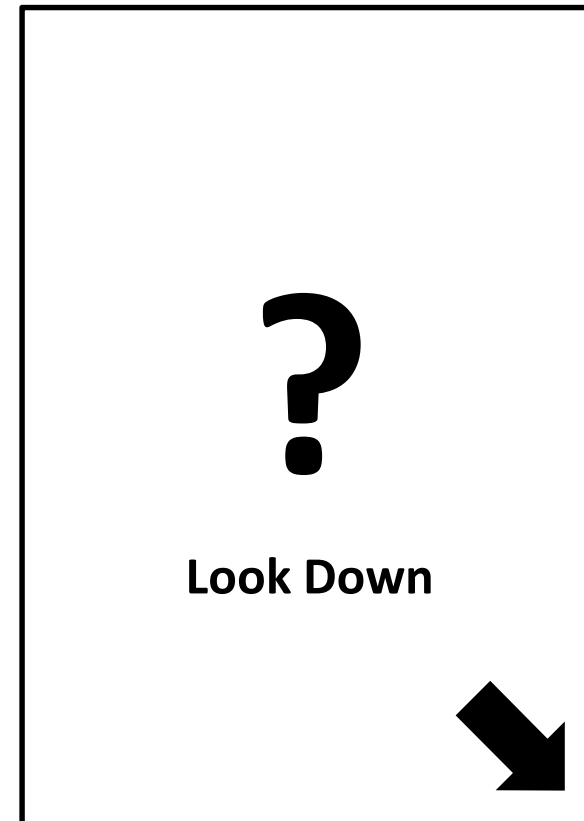
Describe, in one paragraph or so, your interest in investing and why you should be offered a spot

About Us

Prof. Arturo Perez-Reyes



Jack Wei



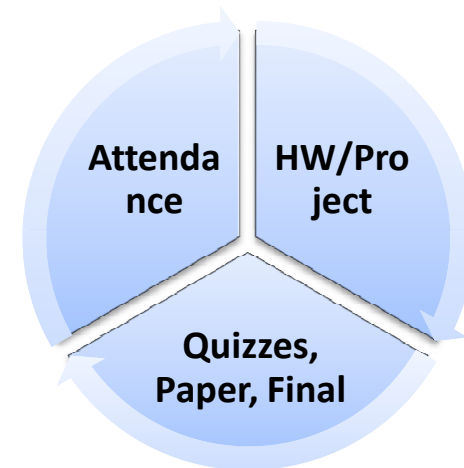
Objective

- Introduction to the financial world
- Understanding of the current WS in crisis
- Exposure to real-life money management
- Investment strategies in **bull vs. bear** markets
- Financial independence



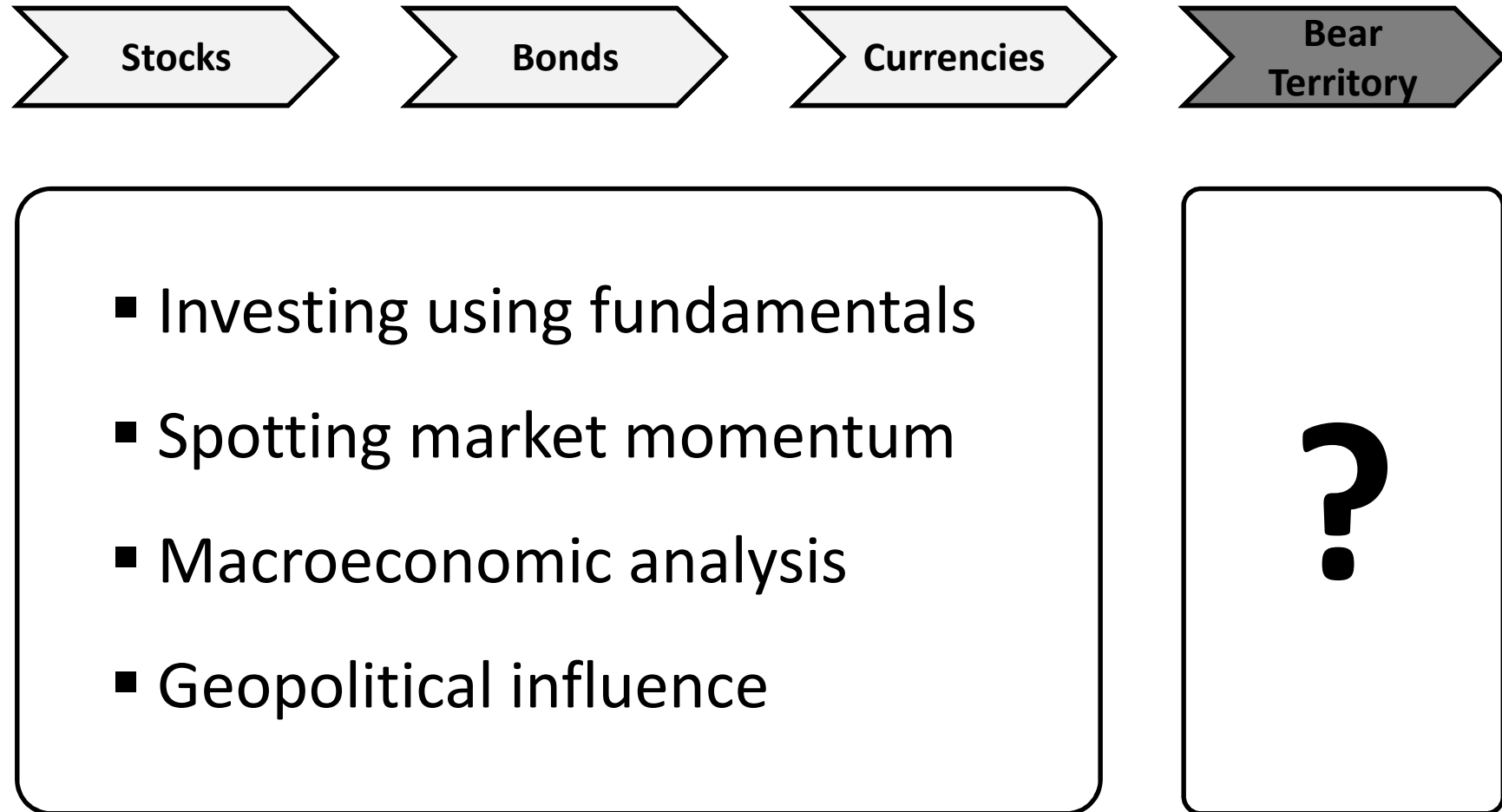
Grading

- **Attendance – 20%**
 - One excused absence allowed
- **Homework/Project – 20%**
 - Weekly check-up on stock simulation project
 - Late HWs will receive up to 50% of grade
- **Quizzes, Paper, Final Exam – 60%**
 - No pre-approved or unexcused make-up
 - Paper must be turned in to pass the course



Students Must Earn 70% to Pass

Materials



Semester Outline

- **Week 1: Stocks (1) – Functions, politics, corporate news**
- **Week 2: Stocks (2) – Data analysis**
- **Week 3: Stocks (3) – ETFs, Options**
- **Week 4: Stocks (4) – Rules, Trading Bullish**
- **Week 5: Stocks (5) – Online simulation**
- **Week 6: Stocks (6) – Online simulation**
- **Week 7: Bonds**
- **Week 8: Currencies**
- **Week 9: Investing in bear market (1)**
- **Week 10: Investing in bear market (2)**
- **Week 11: Investing in bear market (3)**
- **Week 12: Integrating stocks, bonds, currencies, and investment strategies**
- **Week 13: Final exam, turn in essays**

Need Help?

Office Hours

- 30min before or 15min after lecture.
- By appointment
- Location: TBD