

UGBA 137

Practical Topics in Investment Management

This course explores critical issues relating to investment management and focuses on real world applications via critical thinking. Topics include how the investment industry is structured, the basics of portfolio management, common investment strategies and processes, and market forecasting techniques. Practical exercises will include formulating investment objectives, establishing investment policy, performing standard investment-related calculations, developing capital markets technology, applying portfolio management techniques, and a weekly discussion of current financial news stories.

Instructors are professionals from Fisher Investments, a multi-billion dollar investment management firm in the Bay Area. The lead instructor, Michael Hanson, is a senior research analyst and has been with Fisher Investments since 2002. He is also the Managing Editor and a recurring columnist at www.MarketMinder.com. Prior to joining the firm, he worked at Bear, Stearns & Co. Inc. as a Corporate Finance Analyst in its Global Technology Group. Michael is the author of three books (with a fourth due in May 2009 from Wiley Publishers entitled, 20/20 Money). He completed his undergraduate degree in Economics at Claremont McKenna College and is a doctoral candidate at Pacifica Graduate Institute in the field of Mythology with an emphasis in Psychology.

Select other individuals from Fisher Investments will be supplemental guest lecturers.