



# UNIVERSITY OF OTAGO

Department of Accounting and Finance 1991

## Finance 321: Investment Analysis and Portfolio Management

Paper Convenor: Dr Jan Bartholdy

Paper Lecturers: Mr Timothy Crack (Room 101A, ☎ 479 8183), and Dr Jan Bartholdy (Room 126, ☎ 479 8072).

Lecture Times:  
Stream A: Wednesday 9:00 am to 10:50 am BURNS 7  
Stream B: Friday 9:00 am to 10:50 am QUAD 1

Course Description: Finance 321 is a broad investment analysis course. It introduces the basic theory underlying the valuation and selection of financial assets. Topics covered will include Valuation of Stocks, Bonds and Options, Market Efficiency, Asset Pricing Models, and Evaluation of Portfolio Performance.

Required Texts: Reilly, Frank K., Investment Analysis and Portfolio Management, Third Edition, The Dryden Press, 1989.

Carew, Edna, New Zealand's Money Revolution, Allen and Unwin, 1987.

Reference Texts: Malkiel, Burton G., A Random Walk Down Wall Street, Fourth Edition, W.W. Norton & Co., 1985.

Burrowes, A.W. and R.D. Mulholland, Investing on the New Zealand Sharemarket, Third Edition, Macmillan New Zealand, 1987.

Levy, Haim and Marshall Sarnat, Portfolio and Investment Selection: Theory and Practice, Prentice/Hall International, 1984.

Francis, Jack Clark, Investments Analysis and Management, Fourth Edition, McGraw Hill, 1988.

Other Readings: Articles from academic journals, practitioner journals, newspapers and other sources will be distributed by the instructors when appropriate.

1. Overall, how valuable do you think this course has been for you?	Extremely valuable	1	2	3	4	5	Not at all valuable	N.A.
	NUMBER	2	25	59	5	0		0 MED = 2.81
	PER CENT	2	27	65	5	0		0 SD = 0.59
2. How well organised have you found the teacher's contribution to this course?	Very well organised	1	2	3	4	5	Very disorganised	N.A.
	NUMBER	69	21	1	0	0		0 MED = 1.24
	PER CENT	76	23	1	0	0		0 SD = 0.46
3. How would you rate the teacher's ability to communicate ideas and information?	Excellent	1	2	3	4	5	Poor	N.A.
	NUMBER	13	52	24	2	0		0 MED = 2.12
	PER CENT	14	57	26	2	0		0 SD = 0.68
4. How much has the teacher stimulated your interest in the field?	Very much	1	2	3	4	5	Not at all	N.A.
	NUMBER	4	29	48	8	2		0 MED = 2.76
	PER CENT	4	32	53	9	2		0 SD = 0.77
5. How would you describe the teacher's attitude toward students in this course?	Very helpful	1	2	3	4	5	Very unhelpful	N.A.
	NUMBER	54	35	1	1	0		0 MED = 1.41
	PER CENT	59	38	1	1	0		0 SD = 0.58
6. Overall, how effective have you found the teacher in teaching this course?	Very effective	1	2	3	4	5	Very ineffective	N.A.
	NUMBER	25	50	15	1	0		0 MED = 1.91
	PER CENT	27	55	16	1	0		0 SD = 0.69

## Finance 321 - Mr T. Crack

## STUDENT EVALUATION OF TEACHING

This form gives you an opportunity to indicate your reactions to this course and the way it has been taught. Student opinion is a valuable guide in course planning and in evaluating teaching.

In the questions below, the word *course* refers to the course/paper—or part of a course/paper—identified in the heading of this questionnaire.

When considering the questions, please try not to let your overall reaction to the course prevent you from noting areas of strength or weakness. Circle the number which best indicates your reaction.

1. Overall, how valuable do you think this course has been for you?
 

extremely valuable	very valuable	moderately valuable	slightly valuable	not at all valuable
1	2	3	4	5
  
2. How well organised have you found Mr Crack's contribution to this course?
 

very well organised	well organised	moderately well organised	disorganised	very disorganised
1	2	3	4	5
  
3. How would you rate Mr Crack's ability to communicate ideas and information?
 

excellent	very good	good	fair	poor
1	2	3	4	5
  
4. How much has Mr Crack stimulated your interest in the field?
 

very much	quite a lot	moderately	a little	not at all
1	2	3	4	5
  
5. How would you describe Mr Crack's attitude toward students in this course?
 

very helpful	helpful	moderately helpful	rather unhelpful	very unhelpful
1	2	3	4	5
  
6. Overall, how effective have you found Mr Crack in teaching this course?
 

very effective	effective	moderately effective	rather ineffective	very ineffective
1	2	3	4	5

Do you normally attend Finance 321 on a Wednesday or a Friday?

Please circle one: W or F