



Finance 440: Portfolio Design and Management Application for Admission

Course Description: Students develop skills to analyze individual securities and then focus on investment portfolio design. These skills will ultimately be applied to UNCW's real-dollar student-managed investment fund, a fund sparked by a most generous gift from the BB&T Foundation. Although several asset classes may be discussed in the class, equity will be the focal asset class for analysis. Fundamental analysis will be emphasized, but technical analysis as well as the psychology of investing are considered important and will be discussed. After developing security valuation skills, efforts will then shift to sector analysis and portfolio construction. Our goal will be to create an investing framework which can be inherited and improved upon by students in future semesters.

Course Admission: Outstanding students may apply for admission to this course; admission is competitive. In general, students must be admitted to the Cameron School of Business, must be pursuing a finance option, and must have taken Finance 335, Finance 330, and Finance 336. *Please submit your application* via email to Dr. Sackley (sackleyw@uncw.edu).

Application

Last Name:

First Name:

Middle Initial:

Student ID:

University email:

Expected Graduation Date:

UNCW GPA (see degree audit):

CSB GPA (see degree audit):

Total College Credits (see degree audit):

Transfer Credits (see degree audit):

Finance Courses Taken and Grade Earned:

Finance Courses	Grade Earned
Fin 335 (required)	
Fin 330 (required)	
Fin 336 (required)	

Please mention any *honors* received, *scholastic achievements* attained, *leadership posts* held, and *activities* pursued at UNCW:

Please briefly state your reasons for taking Fin 440.