

APPLIED INVESTMENT ANALYSIS GRADUATE CERTIFICATE

The Applied Investment Analysis Graduate Certificate provides students with both a theoretical and a practical understanding of the portfolio construction and stock selection processes. Topics covered include financial statement analysis, fundamental analysis, and stock valuation.

Learning Goals and Outcomes

Goal 1: Develop stakeholder value and functional understanding.

Outcome 1.1: Students will demonstrate understanding of financial concepts: the risk-return trade-off, the time value of money, cash flows vs. profits, efficient capital markets, and risk & diversification.

Goal 2: Develop problem solving and critical thinking skills.

Outcome 2.1: Students will analyze, synthesize, and evaluate information and data as the basis for solving problems and making decisions.

Goal 3: Develop interpersonal and communication skills.

Outcome 3.1: Students will demonstrate the ability to correspond effectively and persuasively in a business format, communicate effectively with individuals and within teams, and present to both individuals and groups clearly and convincingly.

Goal 4: Students will develop an understanding of—and the ability to apply—the following Ignatian values: a commitment to rigorous education and lifelong learning; an insistence upon ethical decision making; a desire for social justice; and a care and concern for others.

Goal 5: Students will learn how to: measure risk and estimate expected returns; analyze and value fixed income, equity, and derivative securities; use derivative securities in risk management applications; and construct portfolios suitable for various investor characteristics and objectives.

Requirements

Code	Title	Hours
FIN 550	Shareholder Value Management (Must be completed before the upper-level courses) ¹	3
FIN 575	Fundamental Financial Analysis	3
FIN 610	Security Analysis & Investment	3
FIN 613	Applied Investment Management	3
Total Hours		12

¹ Students in an SJU 4+1 program who were waived out of FIN 550 based upon earning a grade of B or higher in FIN 300 must replace FIN 550 in this certificate with FIN 602. No other substitutions are allowed in this certificate.