MSBA 6939 - Applied Investment Analysis

Fall 2026 Syllabus, Section A01, CRN 43968,

Credit hours: 3

Instructor

Yaqin Wang

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Public Instructor Information

Instructor Title: Professor
Instructor Professional Qualifications: Ph.D. in Economics, University of Kansas, 2002
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Course Description

6939. Applied Investment Analysis. This course introduces graduate students to core investment principles with a strong emphasis on applied, data-driven analysis. Students learn to evaluate financial markets, analyze securities, construct portfolios, and make investment decisions using Excel, Python, and Tableau. The course integrates financial statement analysis, portfolio theory, risk/return models, and equity/fixed-income valuation with hands-on data applications. 3 s.h.

Course Readings

Group	Title	Author	ISBN
Required	Essentials of Investments with Connect Access	Bodie, Z., Kane, A., & Marcus, A. J.	9781264140244

The course readings are subject to change in the event of extenuating circumstances, research developments, current events, and/or to ensure better learning.

Weekly Schedules

Week of	Reading(s)	Proposed Topic	Due/To Prepare for Class
8/24	Chapters 1–2	Investment Landscape and Human-AI Investment Loop	Discussion 1, Lab 1, Homework 1, Quiz 1
8/31	Chapter 5	Risk and Return	Discussion 2, Lab 2, Homework 2, Quiz 2
9/7	Chapter 6	Diversification and Portfolio Construction	Discussion 3, Lab 3, Homework 3, Quiz 3
9/14	Chapters 7-8	CAPM, Beta, Alpha, and Market Efficiency	Discussion 4, Lab 4, Homework 4, Quiz 4
9/21	Chapters 10-11	Bonds, Yields, and Interest-Rate Risk	Discussion 5, Lab 5, Homework 5, Quiz 5
9/28	Chapters 12-13	Macro, Industry Analysis, and Equity Valuation	Discussion 6, Lab 6, Homework 6, Quiz 6
10/5	Chapter 18	Performance Evaluation and Final Recommendation	Discussion 7, Lab 7, Homework 7, Quiz 7, Final Project

The course schedule, policies, procedures, and assignments in this course are subject to change in the event of extenuating circumstances, by mutual agreement, and/or to ensure better learning.