

Georgia Tech Scheller College of Business

MGT 3076 – Investments

Course Syllabus

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Course Content

This course is a rigorous introduction to the foundations of investment analysis and portfolio management. The course introduces students to the skills and tools required for financial decision-making across a range of market environments. We will explore both theoretical frameworks and practical applications relevant to individual and institutional investors. Topics include the risk-return tradeoff, market efficiency, portfolio theory, and macroeconomic trends that supplement the valuation analysis of a wide range of securities, including stocks, options, ETFs, and mutual funds. By the end of the course, you should be able to evaluate investment opportunities critically, understand the trade-offs inherent in portfolio design, and apply core investment principles in both academic and real-world settings.

Prerequisites

MGT 3062 or MGT 3078. The course assumes proficiency in mathematics, statistics, and spreadsheet software (e.g., correlations, regression analysis).

Textbooks & Reading Material

Lecture slides will be posted on Canvas. Additional readings from the financial press will be assigned and provided as the course progresses. Regular access to a financial news source (e.g., Wall Street Journal, Financial Times, Bloomberg) is strongly encouraged.

Textbook: *Essentials of Investments (12th Edition)*

Zvi Bodie, Alex Kane, and Alan J. Marcus, McGraw-Hill, 2021

ISBN 978-1260772166.

Optional Textbook: *Corporate Finance (5th Edition)*

Jonathan Berk, Peter DeMarzo, Pearson, 2019

ISBN 978-1292304151

Course Pace

This class is fast-paced, technical, and heavy-loaded. You should expect a fast pace and heavy quantitative load in the form of weekly problem sets and daily pop quizzes. The asymmetric workload across the semester is intentional and reflects how finance is learned and practiced in professional settings. You should plan your time accordingly.

Grading

This class is quantitative. It is your responsibility to ensure that you keep up with the material. Grades will be determined by attendance & class engagement, monitored with regular pop quizzes (30%), assignments (30%), a midterm test (20%), and a final exam (20%).

Course Policies

Classroom Expectations

- Devices: To foster a focused and engaging classroom environment, cell phones, tablets, and laptops are not allowed in class.
- Attendance: Attendance is mandatory. You are allowed three absences.
- Punctuality: You are expected to arrive on time and stay to the end of the session.
- Respect to Classmates: Engage respectfully and thoughtfully in class discussion, especially when views differ. Our goal is to foster a professional, open learning environment and adhere to the [Georgia Tech Student-Faculty Expectations](#).

Calculator

You must bring a calculator to all exams. At a minimum, your calculator should have square root, exponent, and natural log functions. A financial calculator is sufficient. You are responsible to learn how to use your calculator by working out problems, especially discounted cash flow problems.

Programmable calculators must be cleared before exams. Sharing calculators during exams is not permitted. Phones, tablets, laptops, or any device with internet access may not be used as a calculator.

Class Sessions

All sessions will be held in person and will not be recorded or streamed unless otherwise noted. Please attend regularly and participate actively.

Grading Appeals

If you believe a grade was assigned in error, submit a written request within 1 week of receiving your grade. The entire assignment or exam will be regraded, and the grade may go up, down, or remain the same. Verbal appeals will not be considered.

Academic Integrity

Georgia Tech aims to cultivate a community based on trust, academic integrity, and honor. Students are expected to act according to the highest ethical standards. Review [Georgia Tech's Honor Code](#) and the student [Code of Conduct](#).

Any student suspected of cheating or plagiarizing on a quiz, exam, or assignment will be reported to the Office of Student Integrity, who will investigate the incident and identify the appropriate penalty for violations.

Late Work & Extensions

Assignments are due on the date and time specified in the course schedule. Extensions are granted only in cases of documented extenuating circumstances, such as serious illness, family emergency, or other unavoidable events beyond the student's control. Documentation may include a doctor's note, official notice from the Institute, or other verifiable evidence. Routine scheduling conflicts, travel plans, or workload from other courses do not qualify. Requests for extensions should be made at least **24 hours** in advance when possible.

Accommodations for Students with Disabilities

If you are a student with learning needs that require special accommodation, please contact [the Office of Disability Services](#) (404-894-2563) as soon as possible to make an appointment to discuss your special needs and to obtain an accommodations letter. Please also e-mail me as soon as possible in order to discuss your learning needs.

Student-Faculty Expectations Agreement

At Georgia Tech, we believe that it is important to strive for an atmosphere of mutual respect, acknowledgement, and responsibility between faculty members and the student body. [The Student-Faculty Expectations](#) articulate some basic expectations that you can have of me and that I have of you. In the end, simple respect for knowledge, hard work, and cordial interactions will help build the environment we seek. Therefore, I encourage you to remain committed to the ideals of Georgia Tech while in this class.

Artificial Intelligence

You may use AI to generate ideas and further your understanding of course content. However, please know that these programs frequently hallucinate, i.e., they generate incomplete and/or inaccurate content. Be aware that relying on AI too heavily may limit your own independent thinking and creativity.

You may not present any AI-generated work as your own. If you include AI-generated content in your work, you should properly cite it like any other reference.

Any plagiarism or cheating will be dealt with severely under relevant Georgia Tech policies.

More information on Georgia Tech's policy regarding the use of AI can be found at the [OIT](#) website.