



## Standard Course Outline

### FIN 630 Seminar in Financial Forecasting

#### I. General Information:

Units: 3 credits  
Prerequisites: FIN 600.  
SCO prepared by: Dr. Cindy Chen  
and revised by Jasmine Yur-Austin  
Date Prepared: Feb. 2020

#### II. Catalog Description:

Research projects in industry, individual company, product and commodity areas. Letter grade only (A- F).

#### III. Curriculum Justification:

The course addresses a number of [COB Graduate Program Learning Goals](#):

##### General

- ♦ **Critical Thinking:** Students will be able to demonstrate conceptual learning, critical thinking, and problem-solving skills.
  - Students will be able to (a) appraise, compare and explain conceptual and theoretical knowledge, and (b) apply current and relevant forecasting methods to corporate, industry, and macro-economic data.
- ♦ **Ethics:** Students will be able to demonstrate awareness and knowledge of ethical, social responsibility, and citizenship issues in the local, regional, and world communities.
  - Students will be able to (a) distinguish ethical corporate actions from ones that are not, and (b) understand how unethical behavior can lead to decline in a firm's value and (c) evaluate the potential implications on corporate governance policies.
- ♦ **Interpersonal, Leadership & Team Skills:** Students will be able to demonstrate interpersonal and leadership skills for working in a dynamic and diverse world, both independently and in a team environment.
  - Students will be able to (a) develop and demonstrate the competence of formulating valuation-type excel project, develop investment decisions and deliver oral presentations by managing interpersonal conflicts, negotiating and integrating their skill sets with team members and (b) demonstrate the comprehension of common errors in team/group decision making setting and correct these errors as a team.

##### Management Specific

- ♦ **Business Functions:** Students will be able to demonstrate understanding of all business functions, forward-looking practices and related theories and be able to integrate this functional knowledge in order to address current business problems.
  - Students will be able to (a) analyze cash budget, capital budgeting, capital structure in corporations, (b) illustrate to generate efficient frontier, (c) construct and manage investment portfolios, and (d) evaluate other economic data.



- ♦ **Quantitative & Technical Skills:** Students will illustrate the degree of competence of quantitative and technological skills enabling them to analyze, interpret, and communicate business data effectively and to improve business performance.
  - Students will be able to (a) demonstrate quantitative and technical skills and generate predictions, (b) justify decisions based on quantitative analysis by categorizing the principles, concepts, (c) demonstrate the proficiency of techniques through exams, homework assignments, and research projects and (d) evaluate the relative worth of investment projects under various assumptions and scenarios.
- ♦ **Domestic & Global Environment:** Students will be able to demonstrate knowledge of today's dynamic, forward-looking and global-oriented business environment (e.g., legal, regulatory, political, cultural, and economic), especially the links between our region and global business.
  - Students will be able to (a) evaluate and defend investment decisions in both domestic and global marketing environment and (b) appraise legal, regulatory, political, cultural and economic environmental factors to make financial management decisions.

#### **IV. Course Objectives, Student Learning Outcomes, Evaluation Instruments, and Instructional Strategies for Skill Development**

##### **OBJECTIVE - Critical Thinking:**

##### **A. MEASURABLE STUDENT LEARNING OUTCOME(S):**

After taking this course, students will be able to (a) apply EXCEL analytical models to deliver quantitative results, (b) relate the assessment results to the investment and business decisions, and (c) defend the managerial decision based on feasible assumptions.

##### **B. EVALUATION INSTRUMENTS (ASSIGNMENTS):**

Specific assignments will vary by instructor, but typical assignments include and problem solving-oriented exams and quizzes, short answer and essay exams, and in-class problem-solving assignments. EXCEL must be used whenever possible.

##### **C. INSTRUCTIONAL STRATEGIES FOR SKILL DEVELOPMENT:**

Instructors will review the key knowledge before the assignments and provide feedback on the assignments. Instructors will explain rubric for writing and quantitative expectations both before and after each assignment.

##### **OBJECTIVE - Business Functions:**

##### **A. MEASURABLE STUDENT LEARNING OUTCOME(S):**

After taking this course, students will be able (a) differentiate various EXCE models by examining different theories such as bond valuation, capital budgeting, financial ratio analyses, etc., and (b) justify managerial decisions based on analytical results.

##### **B. EVALUATION INSTRUMENTS (ASSIGNMENTS):**

Specific assignments will vary by instructor, but typical assignments include excel valuation group case assignment and valuation project

##### **C. INSTRUCTIONAL STRATEGIES FOR SKILL DEVELOPMENT:**

Instructors will explain rubrics for writing expectations both before and after the valuation



project, and assignments.

**OBJECTIVE - Quantitative and Technical Skills:**

**A. MEASURABLE STUDENT LEARNING OUTCOME(S):**

After taking this course, students will be able to (a) identify and formulae appropriate EXCEL / WRDS analytical models to illustrate quantitative results, (b) relate the quantitative results to the current, relevant and ultimate business decision and (c) defend and summarize the managerial decisions under feasible assumptions.

**B. EVALUATION INSTRUMENTS (ASSIGNMENTS):**

Specific assignments will vary by instructor, but typical assignments include excel group case assignment and valuation project EXCEL, WRDS and Bloomberg terminal must be used whenever possible.

**C. INSTRUCTIONAL STRATEGIES FOR SKILL DEVELOPMENT:**

Instructors will explain rubrics for writing expectations both before and after the valuation project, reviewing components of examples of well-written reports, incorporating feedback on reports with opportunities for revision.

**V. Outline of Subject Matter**

**SUGGESTED COURSE SCHEDULE / TOPICS TO BE COVERED**

1. Cash Budget
2. Forecasting Financial Statement
3. Capital Budgeting with Uncertainty
4. Regression Analysis
  - 4.1. Simple Linear Regression
  - 4.2. Multiple Linear Regression: Predict president election
  - 4.3. Non-linear Regression
    - 4.3.1. Exponential Growth
    - 4.3.2. Power Growth: Quadratic Regression Model
    - 4.3.3. Moving Average
    - 4.3.4. Autoregressive Model
5. Monte Carlo Simulation

**At least one class meeting will be devoted to content related to current topic and futuristic trends of finance including but not limited to Fintech, cryptocurrency, augmented reality, cyber security, public cloud, block chain, etc.**

**VI. Methods of Instruction**

**INSTRUCTION MODE.**

Check one or more modes of instruction that this course is authorized to use. Syllabi must also contain an explicit statement describing the mode of instructional delivery.

May refer to university policies on [Academic Technology and the Mode of Instruction](#) and [Course Syllabi and Standard Course Outlines](#) for descriptions of modes of instruction and for guidelines for non-traditional modes of instruction.



This class can be offered as an online, hybrid, or flipped class, with the approval of the department chair.

- ✓ Traditional                      ✓ Hybrid                      ✓ Local Online                      ✓ Distance Education

### **CLASSROOM ACTIVITIES**

A seminar style approach is utilized which incorporates classroom discussion of capital budgeting topics and case studies, a large portion of which includes problem solving methods via the usage of excel modeling. Grades will be based upon the following activities:

- Participation in class discussions and cases
- Case study assignments
- Examinations

### **EXTENT AND NATURE OF TECHNOLOGY USE.**

Instructors will require students to use WRDS (Wharton Research Data Services) and Excel for data retrieval and data processing tool as part of instruction.

If the course is conducted entirely through Alternative Modes of Instruction, both synchronous and asynchronous learning will be incorporated. Students will access the course material and activities on BeachBoard and will be required to participate in synchronous class meetings via Zoom. All students must have access to a computer or other device with Internet functionality and a webcam to access BeachBoard and Zoom, participate in class activities, and complete assignments. Students must also have access to Internet with sufficient speed in order to be able to participate in synchronous meetings.

Students who experience unexpected technical issues for a class session or assignment will be provided with the opportunity to make up missed work. Students who experience technical issues during a synchronous meeting or with an assignment should notify the instructor via email as soon as possible.

To access this course on [BeachBoard](#) and [Zoom](#), students will need access to the Internet and a supported web browser (Safari, Google Chrome or Firefox). Log in to [BeachBoard](#) with your CSULB Campus ID and BeachID password. Once logged in, you will see the course listed in the My Courses widget; click on the title to access the course. To access Zoom, first [install the latest version](#) of the Zoom app on your device. Use the link provided and/or sign in using your CSULB Campus ID and BeachID password via Single Sign On to create or join a Zoom session. If students need technical assistance during the course or would like to report a technical issue with BeachBoard or Zoom, they should contact the [Technology Help Desk](#).

The university is expected to provide an in-person computer lab in the University Student Union during 2020-21 and the opportunity to borrow laptops and/or wi-fi hotspots, if needed. For laptops, call 562-985-5587, Mo-Fri, 8 am – 5 pm. Click here to access [A map of campus wi-fi coverage](#).

If you need technical assistance at any time during the course or need to report a problem with BeachBoard or Zoom, please contact the Technology Help Desk at [helpdesk@csulb.edu](mailto:helpdesk@csulb.edu) or (562) 985-4959.

## **VII. Information about Textbooks/Readings**

Suggested Reading:

Financial Analysis with Microsoft Excel, Timothy R. Mayes and Todd M. Shank.



Advanced Reading:

*Business Forecasting*, by Hanke and Wichern.

Forecasting, Time Series, and Regression, by Bowerman, O'Connell, and Koehler.

*Forecasting: Methods and Applications*, by Makridakis, Wheelwright, and Hyndman.

### VIII. Instructional Policies Requirements

Instructor's syllabi must contain explicit statements regarding their own policies with regard to plagiarism, withdrawal, absences, etc., which should be consistent with the university policies published in the CSULB Catalog. It is expected that every course will follow university policies on [Attendance](#), [Course Syllabi & Standard Course Outlines](#), and [Final Course Grades, Grading Procedures, and Final Assessments](#). If some or all sections of the course are to be taught, in part or entirely, by distance learning, the course must follow the provisions of university policy on [Academic Technology and the Mode of Instruction](#). Instructors should refer to the current [CSULB Catalog](#) and to the [Academic Senate](#) website for campus guidelines and policy statements as they develop their individual course policies.

Lecturing on theories & concepts of finance and applications to investments. Quantitative techniques and problem solving. Managing an investment portfolio, presentation & discussion (group project). Individual hedging strategy using derivative securities.

Instructors in planning the exams, and other grading procedures, should adhere to the relevant [University Policy on Grades, Grading Procedures, and Final Assessments](#).

The textbooks for this course should be chosen in accordance with the university policy on [Selection of Instructional Materials](#). There are many appropriate textbooks for this course; it is generally agreed that none of them is perfect. The following suggestion is based on the special nature of this core MBA course:

- ♦ Students will arrive at this course with extraordinary range of backgrounds; and therefore prior knowledge will be highly variable, however,
- ♦ Students will have a level of maturity that will enable them to look at a broader picture via more advanced cases, simulations, group projects and
- ♦ Examinations must be essay-type and/or problem solving questions and avoid the use of multiple-choice questions.

### IX. Course Assessment and Grading

Grading policies, procedures, and the percentage of the course grade associated with each assessment must be explicit on each instructor's syllabus and must be consistent with University policy on "Final Course Grades, Grading Procedures, and Final Assessments." Instructors must develop scoring guidelines for assessments, which must be made available to students. The final course grade will be based on a descriptive scale such as the following:

Percent	Grade	Grade Description
90-100%	A	Mastery of the relevant course standards.
80-89%	B	Above average proficiency of the relevant course standards.
70-79%	C	Satisfactory proficiency of the relevant course standards.
60-69%	D	Partial proficiency of the relevant course standards.



Below 60%                      F                      Little or no proficiency of the relevant course standards.

## **X. Disabilities**

The SCO and syllabi should contain a statement regarding support services for students with disabilities. Under the Office of Civil Rights and the Americans with Disability Act, students may disclose **at any time** during the academic semester that they need a classroom accommodation based on a disability. Thus, it is strongly recommended that all SCOs and syllabi use the following language, as it meets both federal and state legal standards.

### **D. The Bob Murphy Access Center (BMAC)**

The Bob Murphy Access Center (BMAC) provides certification for students with disabilities and helps arrange relevant accommodations: [Bob Murphy Access Center](#). Any student requesting academic accommodations based on a disability is strongly encouraged to register with Disabled Student Services (BMAC) each semester. A letter of verification for approved accommodations can be obtained from BMAC. Please be sure to provide your instructor with BMAC verification of accommodations as early in the semester as possible. The phone number for BMAC is (562) 985 5401. The email address is: [bmac@csulb.edu](mailto:bmac@csulb.edu).

## **XI. Assistive Technology**

In compliance with university policy on [Accessibility and Faculty Responsibility for the Selection of Instructional Materials](#), instructors are responsible for ensuring that their syllabi and instructional materials are accessible to all students.

## **XII. Sexual Assault, Rape, Dating/Domestic Violence, & Stalking**

Title IX prohibits gender discrimination, including sexual harassment and sexual misconduct. If you have experienced sexual harassment, sexual assault, rape, dating/domestic violence, or stalking, the campus confidential Victim's Advocate is available to help. Jaqueline Urtez (e: [advocate@csulb.edu](mailto:advocate@csulb.edu), p: (562) 985-2668) can provide free and confidential support, accommodations, and referrals for victims without having to report the assault to campus authorities. While students are welcome to discuss assaults with faculty, both faculty and teaching assistants are mandatory reporters who are required to report all incidents of sexual harassment/misconduct to the Title IX office for follow-up and possible investigation. Students who do wish to report the assault for possible investigation may contact the confidential victim's advocate, who can help them through the reporting process, or they can report the assault directly to the [Title IX Office](#) by completing an online reporting form or contacting the Office of Equity & Diversity at [OED@csulb.edu](mailto:OED@csulb.edu).

## **XIII. Consistency of SCO Standards across Sections**

All future syllabi will conform to the SCO. The course coordinator should review the SCO and offer advice and/or materials to faculty member new to teaching the course. The course coordinator may offer or require regular review of instructors' course materials as well as anonymous samples of student work.

## **XIV. [Additional Resources for Development of Syllabi](#)**