# BUSAD 3850 Portfolio Management: NWU Student Investment Group

1 hour

## Majors, Minors & Degrees:

**Minors**
Finance

## Departments/Programs:

Business, Accounting and Economics (Undergraduate)

This course is an introduction to security and portfolio analysis. Students will be actively engaged in the management of monies recieved from Nebraska Wesleyan alumni and friends of the University. The monies are part of Nebraska Wesleyan's Endowment. Students will gain a fundamental understanding of portfolio management theories and their application by money managers in the market place. Emphasis is placed on gaining a better understanding and application of investment theories and concepts, and portfolio management including, but not limited to, economic, industry and company analysis, and the allocation of the NWU SIG's Fund assets. Performance is based upon total returns which are tracked by the University's consultants for the management of endowment funds. The Student Investment Group evaluates securities for sale on a regular basis and may sell securities as the SIG concludes is most appropriate. Decisions for the purchase of securities must be presented to a committee per Nebraska Wesleyan's SIG Guidelines which are part of the Board of Governor's Investment Policy Statement. Each spring semester an annual newsletter is created regarding the SIG's activities and performance. This newsletter is used for several purposes including reporting to the Financial Committee of the Board of Governors whom is ultimately responsible for the portfolio. No P/F.
*Prerequisite(s): BUSAD 3700 Financial Management or permission of the instructor.*