



上海财经大学

Shanghai University of Finance & Economics

中国上海市国定路777号 邮编200433 777 Guoding Road, Shanghai, 200433, China

## Shanghai University of Finance & Economics

### 2022 Summer Program

### FIN 101 Introduction to Finance

### Course Outline

**Course Code: FIN 101**

**Instructor: Michael J. Petersen, Ph.D.**

**Home Institution: North Dakota State University Fargo, North Dakota**

**Office Hours: by appointment**

**Email: Michael.j.petersen@ndsu.edu**

**Credit: 4**

**Class Hours:** This course will have 52 class hours, including 32 lecture hours, professor 8 office hours, 8-hour TA discussion sessions, 4-hour review sessions.

#### **Course Description:**

This course covers the principles and practices used in the financing of business organizations. Topics include financial planning, funds acquisition, financial analysis, capital budgeting, cost of capital, and ethical issues related to financial management. The course emphasizes key financial management concepts with emphasis on ratio analysis, cash flow estimation, stocks and bonds valuation, capital budgeting, and return risks. A strong understanding of algebra is very important.

#### **Course Goals:**

A student who satisfactorily completes this course should be able to understand and address the following key questions:

1. How much should you save and invest per annum in order to accumulate sufficient wealth for a happy retirement?
2. How does a finance professional read and interpret GAAP financial statements?
3. How should a chief financial officer (CFO) select capital investment projects to maximize stockholder wealth?
4. What does the long-term history of the stock market tell us about risk and return?
5. What is the optimal debt-equity mix in funding capital investment projects?

#### **Required Textbook:**



Ross, Stephen; Randolph Westerfield, and Bradford Jordan. 10th Edition. Essentials of Corporate Finance. McGraw-Hill Education ISBN: 978-1-26-001395-5

### Grading Policy:

In this course, grading will be based on the following:

Mid-term and Final exam (150 pts each)	300 pts
Quizzes (4 at 25 pts each)	100 pts
Homework Submissions (Highest 10 @ 10 pts each)	100 pts
In-Class Assignments (Highest 10 @ 5 pts each)	50 pts
Attendance	<u>50 pts</u>
Total Points	600 pts

Quizzes: Four quizzes will be given, worth 25 points each.

Homework: Twelve homework assignments will be given, with the highest 10 counting toward the grade.

In-Class Assignments: Twelve in-class assignments will be given, with the highest 10 counting toward the grade.

Attendance: Initially, 50 points will be awarded for attendance. This total will decrease by 5 points for every class missed.

### Grade Distribution:

A+:4.3——95-100

A :4.0——87-94

A -:3.7——82-86

B+:3.3——78-81

B :3.0——75-77

B -:2.7——71-74

C+:2.3——68-70

C :2.0——65-67

C -:1.7——61-64

D :1.0——55-60

E :0.0——49-54

X :0.0——0

### Class Rules:

Students are expected to:



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- Attend all classes and be responsible for all material covered in class and otherwise assigned. Any unexcused absence may impact a student's grade. Complete the day's required reading and assignments before class
- Review the previous day's notes before class; make notes about questions you have about the previous class or the day's reading
- Participate in class discussions and complete required written work on time.
- Refrain from texting, phoning or engaging in computer activities unrelated to class during class (不要用手机). Students who do not do this will be asked to leave the class
- While class participation is welcome, even required, you are expected to refrain from private conversations during the class period.

### **Attendance Policy:**

Students are expected to attend class. Attendance will be taken and count towards the grade.



### Course Schedule:

The planned schedule may be modified to suit the interests or abilities of the students or to take advantage of special opportunities or events that may arise during the term.

Class Date	Content	Chapter	Due
Mon Jul 4	Introduction to Financial Management	1	
Tue Jul 5	Financial Statements, Taxes, and Cash Flows	2	Ch 1 HW
Wed Jul 6	Financial Statements, Taxes, and Cash Flows Working with Financial Statements	2 3	
Thu Jul 7	Quiz #1 (Ch 1 and 2) Working with Financial Statements	3	Ch 2 HW
Fri Jul 8	Time Value of Money	4	Ch 3 HW
Mon Jul 11	Discounted Cash Flow Valuation	5	Ch 4 HW
Tue Jul 12	Quiz #2 (Ch 3 and 4) Discounted Cash Flow Valuation Interest Rates and Bond Valuation	5 6	
Wed Jul 13	Interest Rates and Bond Valuation	6	Ch 5 HW
Thu Jul 14	Review		Ch 6 HW
Fri Jul 15	<b>Mid-term Exam (Ch 1 – 6)</b>		
Mon Jul 18	Equity Markets and Stock Valuation	7	
Tue Jul 19	Equity Markets and Stock Valuation Net Present Value	7 8	
Wed Jul 20	Net Present Value Making Capital Investment Decisions	8 9	Ch 7 HW
Thu Jul 21	Quiz #3 (Ch 7 and 8) Making Capital Investment Decisions	9	Ch 8 HW
Fri Jul 22	Capital Market History	10	Ch 9 HW
Mon Jul 25	Capital Market History Risk and Return	10 11	
Tue Jul 26	Quiz #4 (Ch 9 and 10) Risk and Return Cost of Capital	11 12	Ch 10 HW
Wed Jul 27	Cost of Capital	12	Ch 11 HW
Thu Jul 28	Review		Ch 12 HW
Fri Jul 29	<b>Final Exam (Ch 7 – 12)</b>		