



**Course:** FIN 354 – Investments

**Section:** 12129

**Term:** Fall 2026 [Aug 31 – Dec 13]

**Time:** Online – Asynchronous

**Contact Information:**

Instructor: Prof. Jodonnis Rodriguez

Website: [www.jodonnisrodriguez.com](http://www.jodonnisrodriguez.com)

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Office: Hill Hall 412

Office Hours:

<https://emich.zoom.us/my/rodriguezemu>

Tuesday, Wednesday, Thursday 2:00 PM – 4:00 PM via Zoom

Other times are available by appointment via Zoom\*

*\*Please send me an e-mail at least 1 day ahead of time to schedule a Zoom meeting.*

**Textbook and Course Requirements:**

**Essentials of Investments, 12<sup>th</sup> Edition.**

Zvi Bodie, Alex Kane, and Alan J. Marcus, McGraw Hill 2024

ISBN: 978-1-26-077216-6

**Financial Calculator:** I will use the HP 10BII financial calculator.

There is a [free, desktop version](#) of the HP 10BII financial calculator that you can download.

There are also several websites that offer free, online financial calculators.

**Course Prerequisites\*:**

Please review information about prerequisites for this course: **FIN 350.**

\* This course is a prerequisite for FIN 451 and FIN 457. A minimum grade of “C” is needed in FIN 354 to register for the latter courses.

## **Course Description (\*\*Course shell available on Canvas):**

The purpose of the course is to introduce students to fundamentals of investment analysis. The course attempts to highlight the alternative investments available and develop a way of thinking about investments. The course is a mixture of description and theory. The descriptive material involves a discussion of available investment instruments and considers the way the capital market currently works. The theoretical portion takes into consideration ways you should evaluate current investments and future opportunities.

## **University Course Policies**

In addition to the articulated course specific policies and expectation, students are responsible for understanding all applicable university guidelines, policies, and procedures. The EMU Student Handbook is the primary resource provided to students to ensure that they have access to all university policies, support resources, and student's rights and responsibilities. Changes may be made to the EMU Student Handbook whenever necessary, and shall be effective immediately, and/or as of the date on which a policy is formally adopted, and/or the date specified in the amendment. Electing not to access the link provided below does not absolve a student of responsibility. For questions about any university policy, procedure, practice, or resource, please contact the Office of the Ombuds: 248 Student Center, [734.487.0074](tel:734.487.0074), [emu\\_ombuds@emich.edu](mailto:emu_ombuds@emich.edu), or visit the website at [Office of the Ombuds](#).

## [University Course Policies](#)

## **Other Helpful Links:**

[Disability Resource Center](#)  
[Student Handbook](#)

**Student Athletes:** Athletes must provide me with a copy of their *travel letter* prior to any missed classes. **Exams:** Athletes should notify me if they will miss an exam and provide the appropriate travel documentation two weeks prior to the exam. In the case of a missed exam, student athletes are required to take the exam PRIOR to the scheduled class time and are responsible for meeting with me to schedule an appropriate exam time. Failure to provide travel documentation will result in a zero grade for assignments and exams.

## **Remote Work Support**

For help with Canvas, visit the [Center for E-Learning](#) website or contact the Canvas 24/7 Help Desk at 844-326-6322. For additional support, visit the [IT Help Desk](#) website or contact them via e-mail at [itservice@emich.edu](mailto:itservice@emich.edu). Their phone number is 734-487-2120.

## **Online Asynchronous Orientation & Student Expectations**

In Canvas, **this course will be divided into modules**, with each module consisting of multiple chapters. The structure of this class makes your **individual study and preparation** extremely important.

The lecture videos will focus on the more difficult aspects of each chapter and on example problems and concepts from each chapter. After each week, you should review your notes and, in the process, work on additional relevant problems and questions at the end of the chapter. **Practice problems for major chapters will be given with detailed video solutions** to help students become comfortable with the quantitative aspects of this course.

Announcements in Canvas will be used for weekly check-ins, changes to the syllabus, **supplements to the lecture video**, and assessment feedbacks, among other things.

### **Student Performance Expectations:**

- Complete designated assessments by the due date.
- Communicate to the professor areas of academic concern.
- Review all relevant chapter material.
- Review all lecture notes and videos in each module
- Students should log in at least 3x per week to check Discussion boards, Announcements, and work on the current module.
- Students should spend at least 7.50 hours per week on this course, including watching the weekly video content and supplements.

### **Tips for Success:**

- Review all chapter material, lecture notes, or videos provided.
- Access all course material in each module through **Canvas**.
- Outline each chapter for clarity and organization.
- Review all in-chapter example problems [optional].
- Review and complete all practice problems posted in each module.
- Track your progress and grades for all assignments on **Canvas**.
- Post relevant questions in the Q&A Discussion Board in Canvas.
- Use my e-mail address [**Jrodri30@emich.edu**] as the primary method of contact.

### **Student-Professor Engagement**

- E-mail responses are typically made within the same day unless a student e-mails after 7:00 PM in which case an e-mail response will be made the next business day.
- Assessment feedback will be made within 5 business days of the due date.
- I will continually engage with students in the Discussion board Q&A as I read every post made by students.
- I am available for Zoom meetings by appointment to discuss course grades or course material.

## **Grading:**

Please note that I utilize **Canvas** for grades, messages, and to post relevant class material. Designated assessments will not be accepted after their respective due dates.

## **Course Requirements & Assessment Weights:**

<b>Assessments</b>	<b>Total Weight</b>
Quizzes (3x)	37.50%
Discussions (3x)	17.50%
Problem Sets (3x)	45.00%
<b>Total</b>	<b>100.00%</b>

## **I. Quizzes:**

Quizzes are online assessments focused on the conceptual and/or quantitative understanding of the material. The quizzes will generally be available for 120 minutes and consist of 10-20 questions.

- (1) The quizzes will be open no less than 5 days before the quiz is due.
- (2) The quizzes may consist of true/false, multiple-choice, and/or numerical questions.
- (3) The quiz may be attempted a 2<sup>nd</sup> time until 3 hours prior to the due date and time. The **highest quiz grade** will be recorded as the final quiz grade.

**Each quiz is due by 11:59 PM on the due date. See calendar below for quiz due dates.**

**\*\*The quizzes are individual assignments to be completed by each student.**

## **II. Problem Sets:**

Problem sets will focus on the *more challenging* and *quantitative* aspects of the material. The assignment could consist of problem sets, article readings, Excel projects, or a combination of several items.

- (1) Problem sets will be open for at least 1 week prior to their due dates.

**Each problem set is due by 11:59 PM on the due date. See the calendar below for the due dates.**

**\*\* The problem sets are individual assignments to be completed by each student.**

### III. Discussions:

Discussion groups of approximately 8-10 students will focus on community-building and peer learning that is relevant to the course. There are four discussion board threads, one for each module.

- (1) Each person must write an initial post and at least one response post.
- (2) Each discussion's initial post and response post is worth up to 15 points.

Below is the **grading rubric** for the initial post and response post.

<b>PART A -- INITIAL POST (9 Points)</b>		
<b>Criteria</b>	<b>Points</b>	<b>Requirements</b>
Minimum	3	1. 200-300 Words 2. Completed by Deadline 3. Addresses the Prompt
Module Integration	3	1. Use Concepts from Current Module 2. Shows Understanding of Material
Evidence	3	1. Includes Real-World Example OR 2. Cites Credible Source (news, textbook, etc.)

<b>PART B -- RESPONSE POST (6 Points)</b>		
<b>Criteria</b>	<b>Points</b>	<b>Requirements</b>
Minimum	2	1. At least 1 Response 2. 100-150 Words
Quality	2	1. Substantive Response (not just "I agree") 2. Engages with Peer's Ideas 3. Adds Value to the Discussion
Support	2	1. Includes Real-World Example OR 2. Cites Credible Source (news, textbook, etc.)

Each discussion board assignment is due by 11:59 PM on the due date. See the calendar below for the due dates.

\*\* The discussion boards are individual assignments to be completed by each student.

**Grading Policy:** You are responsible for maintaining accurate records of your grades for each assignment and exam. You have one week to review your grades to help you clear up any possible grade discrepancies with me. If you believe there is a discrepancy with your grade, please e-mail me to arrange a meeting between us to discuss the discrepancy. After one week, the posted grade becomes the final grade with the exception of the final exam in which the University reporting policies restrict the time allowed for grade review.

**Grading Scale:**

<b>Percentage</b>	<b>Letter Grade</b>	<b>GPA</b>
94 – 100	A	4.0
90 – 93.99	A-	3.7
85 - 89.99	B+	3.3
80 - 84.99	B	3.0
77 - 79.99	B-	2.7
74 - 76.99	C+	2.3
67 - 73.99	C	2.0
64 – 66.99	C-	1.7
61 - 63.99	D+	1.3
58 - 60.99	D	1.0
55 – 57.99	D-	0.7
0 - 54.99	F	0.0

**Course Calendar:**

**Please check Canvas each week for course updates, lecture supplements, and other material.**

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**Module 1: Aug 31 – Sept 27**

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**Chapter 1 – The Investment Environment**

**Chapter 2 – Asset Classes & Financial Instruments**

**Chapter 3 – Securities Markets**

**Module 1 Discussion (Part A Due Sept 6; Part B Due Sept 13)**

**Module 1 Quiz Due Sept 20, 2026**

**Module 1 Problem Set Due Sept 27, 2026**

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**Module 2: Sept 28 – Nov 1**

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**Chapter 10 – Bond Prices & Yields**

**Chapter 12 – Macroeconomic & Industry Analysis**

**Chapter 4 – Mutual Funds & ETFs**

**Module 2 Discussion Due (Part A Due Oct 4; Part B Due Oct 11)**

**Module 2 Quiz Due Oct 18, 2026**

**Module 2 Problem Set Due Nov 1, 2026**

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**Module 3: Nov 2 – Dec 13**

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**Chapter 5 – Risk & Return**

**Chapter 6 – Efficient Diversification**

**Chapter 7 – Capital Asset Pricing Model**

**Module 3 Discussion Due (Part A Due Nov 8; Part B Due Nov 15)**

**Module 3 Quiz Due Dec 6, 2026**

**Module 3 Problem Set Due Dec 16, 2026**

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**\*\*The syllabus is subject to change. All changes shall be clarified in class or on Canvas.**