

**The University of Texas at Tyler**  
**College of Business and Technology**  
**FA 2024**

**Course Title: Managerial Finance**

**Course Number and Section: FINA 4340-001**

**Scheduled Class Days and Times: TuTh 9:30AM - 10:50AM**

**Instructor Name: Hui Liang James**

**Office Location: SCOB 350.17**

**Phone Number: 903.566.6282**

**Email: [hjames@uttyler.edu](mailto:hjames@uttyler.edu)**

**Best way to contact: email**

**Office Hours: Days/Times AND by appointment: TuTh 8:00AM-9:30AM & 11:00AM-12:00 PM**

**Course Objectives:**

The objective of this course is to provide the student with the basic analytical tools necessary to make value-enhancing financial decisions. Topics covered in the course include the analysis of financial statements, valuation of financial assets, estimation of cost of capital, capital budgeting decisions, capital structure decisions, and mergers and acquisitions.

**Course requirements:**

Students are expected to closely follow the recordings for each chapter. Reviewing the end-of-chapter questions, in addition to completing your assignments, is strongly recommended.

**Required Text:**

- The required textbook is Fundamentals of Corporate Finance, Author: Arthur Ross, Westerfield, and Jordan, **13th edition**.
- Students must have access to **McGraw Hill Connect**, which contains easy access to ample exercise, step-by-step tutorials, sample tests, and valuable feedback for you to be successful in this course.
  - **Connect comes with temporary access of 14 days**. You will need to upgrade to full access **before the end of** the trial period. To register, log into your course home page on UT Tyler Canvas, then click on the link “M-H Connect” on the left navigation bar.
  - **Ebook comes with Connect, but you will lose access to the text at the end of the course.**
- **Ebook+ Connect is \$105 at our bookstore.**

**Recommended Text and References:**

- Using either a financial calculator or Excel to solve the time value of money related questions (e.g., security valuation and capital budgeting) is much easier than using formulas. The calculator used to solve class examples is **Texas Instruments BA II Plus**. You are welcome to use another type/brand financial calculator; however, it is your responsibility to figure out how to solve problems using it.
- Bloomberg/Business week, The Wall Street Journal, Yahoo Finance, Financial Times

**Course Topic outline**

*This schedule is subject to changes by the instructor. Course materials may be rescheduled, added, or removed to achieve overall learning efficiency.*

BEG. DATE	MATERIALS
Week 1: 08/26/24	Syllabus & Chapter 3: Working with financial statements
Week 2: 09/02/24	Chapter 3: Working with financial statements- continued <b>Quiz 1 (Chapter 3)</b> Chapter 7: Interest rates and bond valuation
<b>09/09/24: Census date</b>	
Week 3: 09/09/24	Chapter 7: Interest rates and bond valuation - continued <b>Quiz 1 (Chapter 7)</b>
Week 4: 09/16/24	Chapter 8: Stock valuation
Week 5: 09/23/24	<b>Exam 1 (Chapters 3, 7 &amp; 8)</b>
Week 6: 09/30/24	Chapter 14: Cost of capital
Week 7: 10/07/24	Chapter 14: Cost of capital - continued <b>Quiz 2 (Chapter 14)</b>
Week 8: 10/14/24	Chapter 9: Net present value and other investment criteria
Week 9: 10/21/24	Chapter 10: Making capital investment decisions
Week 10: 10/28/24	Chapter 10: Making capital investment decisions - continued <b>Exam 2 (Chapters 9, 10 &amp; 14)</b>
Week 11: 11/04/24	Chapter 16: Financial leverage and capital structure policy
Week 12: 11/11/24	Chapter 16: Financial leverage and capital structure policy-continued
Week 13: 11/18/24	Chapter 26: mergers and acquisitions
Week 14: 11/25/24	<b>Thanksgiving</b>
Week 15: 12/02/24	<b>Project Due</b> <b>Exam 3 (Chapters 16 &amp; 26)</b>
Week 16: 12/09/24	<b>Optional Comprehensive Final Exam</b>

**Exam:**

Three exams will be given throughout the semester, and each exam is non-cumulative. **The final comprehensive exam is optional. If you take all four exams, the lowest grade will be dropped from the calculation of your final grade.** Preparing yourself with a formula sheet may be beneficial.

**Homework:**

Homework assignments are assigned through *McGraw Hill Connect*. Homework assignments all have **unlimited time and attempts**. You will have one assignment for each chapter. **No late submission will be allowed except for documented emergencies.**

**Quiz:**

Two quizzes will be assigned through McGraw Hill Connect. All quizzes have two attempts with 90 minutes time limit. **No late submission will be allowed except for documented emergencies. No make-up quiz is allowed.**

**Project:**

One project will be given in the middle of the semester and due the week before the final week.

**Eikon certificate:**

Eikon is a platform where you can access leading financial information and employ advanced analytic tools to make successful financial and investment decisions as market professionals. Students are *strongly encouraged, but not required*, to complete the Eikon certificate upon completing the course. As it is not part of the curriculum, no materials will be provided during our class time. You can find information about how to get the Eikon certificate online at <https://training.refinitiv.com/eikon/?mkt=44#flr439> . If you need any assistance, you may seek help from the student workers at the finance lab. The deadline to complete the Eikon certificate in order to receive bonus points is 04/30/2024.

**Make-Up Policy:**

**If you must miss an exam, you must contact me in person before the exam. Evidence for the unavoidable absence is required.** Failure to do so may result in a zero for that exam. Make-up exams, if allowed, may be taken before the absence and no later than the next scheduled class period.

**Evaluation**

A student’s grade for the class will be based on performance in exams, assignments, and class participation. Below is the grading scale with the corresponding weights for each component:

1. Exam 1	100 pts.
2. Exam 2	100 pts.
3. Exam 3	100 pts.
4. Comprehensive Exam	100 pts. (Optional)
5. Homework	130 pts.
6. Quizzes	20 pts.
7. Project	30 pts.
8. Class participation	10 pts
8. <b>Eikon certificate</b>	<b>10 Bonus points</b>
TOTAL	490 pts.

The grade scale is as following:

$\geq 90\%$	:	A
$\leq 80\% < 90\%$	:	B
$\leq 70\% < 80\%$	:	C
$\leq 60\% < 70\%$	:	D

To find your final letter grade, use the total points earned/total points available(490) to get the percentage, then match it with the above scale.

**The percentage of the grade on Canvas may not be accurate if you have missed any assignments during the semester because the percentage is calculated based only on the completed assignments.**

**UT Tyler Honor Code**

Every member of the UT Tyler community joins together to embrace: Honor and integrity that will not allow me to lie, cheat, or steal, nor to accept the actions of those who do.

### **Artificial Intelligence Statement**

UT Tyler is committed to exploring and using artificial intelligence (AI) tools as appropriate for the discipline and task undertaken. We encourage discussing AI tools' ethical, societal, philosophical, and disciplinary implications. All uses of AI should be acknowledged as this aligns with our commitment to honor and integrity, as noted in UT Tyler's Honor Code. Faculty and students must not use protected information, data, or copyrighted materials when using any AI tool. Additionally, users should be aware that AI tools rely on predictive models to generate content that may appear correct but is sometimes shown to be incomplete, inaccurate, taken without attribution from other sources, and/or biased. Consequently, an AI tool should not be considered a substitute for traditional approaches to research. You are ultimately responsible for the quality and content of the information you submit. Misusing AI tools that violate the guidelines specified for this course is considered a breach of academic integrity. The student will be subject to disciplinary actions as outlined in UT Tyler's Academic Integrity Policy. *Refer to the About This Course section of the UT Tyler Syllabus Module for specific information on appropriate use of AI in your course(s).*

### **Disability/Accessibility Services**

In accordance with Section 504 of the Rehabilitation Act, Americans with Disabilities Act (ADA) and the ADA Amendments Act (ADAAA), the University of Texas at Tyler offers accommodations to students with learning, physical, and/or psychological disabilities. If you have a disability, including a non-visible diagnosis such as a learning disorder, chronic illness, TBI, PTSD, ADHD, or a history of modifications or accommodations in a previous educational environment, you are encouraged to visit <https://hood.accessiblelearning.com/UTTyler/> and fill out the New Student application. The Student Accessibility and Resources (SAR) office will contact you when your application has been submitted and an appointment with the Assistant Director Student Accessibility and Resources/ADA Coordinator. For more information, including filling out an application for services, please visit the SAR webpage at <https://www.uttyler.edu/disability-services>, the SAR office located in the Robert Muntz Library, LIB 460, email [saroffice@uttyler.edu](mailto:saroffice@uttyler.edu), or call 903.566.7079."

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