

East Texas A&M University
FIN 550 – Advanced Financial Modeling – Fall 2025 – 01W (81366)
Syllabus

Instructor: Dr. Sharier Azim Khan, CFA
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Office: BA 305 (inside BA 301)
Office Hours: Tue, Thurs 9:30am-10:45am (virtual at <https://tamuc.zoom.us/j/93703464233>) and
Tue, Thurs 2:30pm-3:45pm (in-person)

Class Room: Online/ Web Based Class. You MUST check your email and course D2L (MyLeo) on a regular basis.

Class Times: All lecture videos will be uploaded in MyLeo (D2L Brightspace). In addition, live Q&A sessions will be held thru Zoom. The exact dates and times of the live Q&A sessions will be announced during the term.

Course Description and Objectives

This course uses the basic principles of finance to develop financial models and apply them to solve common financial management problems faced by business corporations. The course uses MS Excel for building models and solving problems. Students will get opportunities to practice their modeling skills on specific finance problems. The course focuses on models for financial management problems related to financial analysis, planning and cash budgeting, risk-return trade off, asset valuation and investment decisions. The emphasis throughout will be on applications and model building rather than on theory.

The student, upon completion of this course, should be able to:

1. Build and apply models using MS Excel and use them to solve problems related to financial planning, asset valuation, investment decisions and other financial management problems.
2. Students will apply these models, where relevant, using currently available data.

Course Materials

Textbook (recommended): Principals of Finance with Excel, 3rd Ed., by Simon Benninga and Tal Mofkadi (Oxford University Press).
Laptop/Desktop: Microsoft (MS) Excel.

Note: I will teach you how to solve problems using MS Excel. Please note that MS Excel is a Microsoft product and works best with Microsoft Windows and I will be using MS Excel in Windows. If you are using a Mac iOS, there might be compatibility issues and it is your responsibility to troubleshoot Microsoft Excel in Mac iOS.

Grading System

Course total score will be based on the following components as below:

D2L Homework Quizzes (5*7 points)	= 35 points
Project Assignment	= 15 points
Mid-Term Exam	= 20 points
Comprehensive Final Exam	= 30 points
Total	= 100 points

Your total score will be rounded to the nearest whole number in Excel and grades will be based upon the following standard:

90 points or above	=	A
80 --- 89 points	=	B
70 --- 79 points	=	C
60 --- 69 points	=	D
Below 60 points	=	F

Note: Instructor reserves the right to modify the above grading system with prior announcement in class or thru D2L/ email

Use of Artificial Intelligence (AI)

East Texas A&M University acknowledges that there are legitimate uses of Artificial Intelligence, ChatBots, or other software that has the capacity to generate text, or suggest replacements for text beyond individual words. **Any use of such software must be documented.** Any undocumented use of such software constitutes an instance of academic dishonesty (plagiarism). In any case, students are fully responsible for the content of any assignment they submit, regardless of whether they used an AI, in any way. **This specifically includes cases in which the AI plagiarized another text or misrepresented sources.**

Course Requirements

This course will use the MyLeo (D2L Brightspace) course management system. Please check the D2L regularly for course information, class lecture materials, homework quizzes, assignment, exam dates and announcements. D2L quizzes and assignments typically will have due dates and will not be available for submission after the due date. Because technical problems may arise, please do not wait until the last minute to complete assignments and quizzes. Use only Chrome to access this course on MyLeo (D2L Brightspace). D2L is a Windows-based product. Safari, Firefox, Edge, Internet Explorer (IE) are not supported browsers. Often your assignments are not fully visible/accessible from browsers other than Chrome. If you are using a Mac iOS, you must download the Chrome app. However, the app does not fully guarantee your full accessibility.

Examinations

Exams will be primarily of an objective nature, e.g., problem solving, true-false, and multiple-choice. You must not discuss exam contents with any other person. You are on your honor to help preserve the integrity of the exam. Make-up exams will ONLY be considered under extenuating circumstances. Work, personal travel, etc. are NOT extenuating circumstances. Extenuating circumstances would include school sponsored excused event (communicated by faculty advisor/coach), hospitalization, medical emergency, physical injury, or death of an immediate family member. You will be required to provide proof of the extenuating circumstance to be approved for a make-up exam. Make-up exams for students attending school-sponsored events, are scheduled before event departure. Other approved makeups are scheduled within three days of approval of documented extenuating circumstances.

Homework Quizzes

There will be several homework quizzes given during the term through D2L. You are allowed to use your textbook and class lecture materials during the homework quizzes; however, you must complete those on your own without anyone's help. Each homework quiz will have its deadline and there will be NO extension on the deadline.

Project Assignment

There will be one project assignment given during the term. Details on the project will be discussed in class. You are encouraged (NOT mandatory) to work in groups with a maximum of four members in each group. You are free to form your own group for the project assignment. There will be NO extension on the Project deadline.

Tentative Course Schedule

	Chapter/ Exam/ Others
Week 1	Chapter 1: Introduction and basics
Week 2	Chapter 2: Time value of money
Week 3	Chapter 3: Measures for evaluation
Week 4	Chapter 6: Capital budgeting
Week 5	Chapter 7: What is risk
Week 6	Chapter 8: Portfolio statistics
Week 7	Mid-Term Exam: Chapters 1-3 and 6-7 on Oct 10-12
Week 8	Chapter 9: Portfolio diversification
Week 9	Chapter 10: Risk Diversification and efficient front
Week 10	Chapter 11: CAPM
Week 11	Chapter 12: Performance evaluation
Week 12	Chapter 15: Bond valuation
Week 13	Chapter 17: Options Project Assignment Due on Nov 23
Week 14	Thanksgiving Break
Week 15	Prepare for Final Exam
Week 16	Comprehensive Final Exam on Dec 6-8

Note: All dates are tentative and may be changed with prior announcement in class or thru D2L/ email.

Students' Mental Health

The Counseling Center, located in the Halladay Building, Room 203, offers counseling services, educational programming, and connection to community resources for students. Students have 24/7 access to the Counseling Center's crisis assessment services by calling 903-886-5145. For more information regarding Counseling Center events and confidential services, please visit www.tamuc.edu/counsel

Students with Disabilities

The Americans with Disabilities Act (ADA) is a Federal anti-discrimination statute that provides comprehensive civil rights protection for persons with disabilities. Among other things, this legislation requires that all students with disabilities be guaranteed a learning environment that provides for reasonable accommodation of their disabilities. If you have a disability requiring an accommodation, please contact:

Office of Student Disability Services

Email: StudentDisabilityServices@tamuc.edu

Web: <https://www.tamuc.edu/student-disability-services/>

Academic Integrity

Students at East Texas A&M University are expected to maintain high standards of integrity and honesty in all of their scholastic work. For more details and the definition of academic dishonesty see the following procedures:

Undergraduate Academic Dishonesty 13.99.99. R0.03

<https://inside.tamuc.edu/aboutus/policiesproceduresstandardsstatements/rulesprocedures/13students/undergraduates/13.99.99.R0.03UndergraduateAcademicDishonesty.pdf>

Graduate Student Academic Dishonesty 13.99.99. R0.10

<https://inside.tamuc.edu/aboutus/policiesProceduresStandardsStatements/rulesProcedures/13students/graduate/13.99.99.R0.10.pdf>

Nondiscrimination Statement

East Texas A&M University will comply in the classroom, and in online courses, with all Federal and state laws prohibiting discrimination and related retaliation on the basis of race, color, religion, sex, national origin, disability, age, genetic information, or veteran status. Further, an environment free from discrimination on the basis of sexual orientation, gender identity, or gender expression will be maintained.

Campus Concealed Carry

Texas Senate Bill - 11 (Government Code 411.2031, et al.) authorizes the carrying of a concealed handgun in East Texas A&M University buildings only by persons who have been issued and are in possession of a Texas License to Carry a Handgun. Qualified law enforcement officers or those who are otherwise authorized to carry a concealed handgun in the State of Texas are also permitted to do so. Pursuant to Penal Code (PC) 46.035 and Rule 34.06.02.R1, license holders may not carry a concealed handgun in restricted locations.

For a list of locations, please refer to the Carrying Concealed Handguns On Campus document and/or consult your event organizer.

Web url:

<https://inside.tamuc.edu/aboutus/policiesProceduresStandardsStatements/rulesProcedures/34SafetyOfEmployeesAndStudents/34.06.02.R1.pdf>

Pursuant to PC 46.035, the open carrying of handguns is prohibited on all A&M- Commerce campuses. Report violations to the University Police Department at 903- 886-5868 or 9-1-1.