



THE OHIO STATE UNIVERSITY

FISHER COLLEGE OF BUSINESS

Financial Software Applications

Busfin: 7200 Fall 2022

Instructor: Matt Sheridan, CFA, CAIA

Lecture: Tuesday/Thursday 2:45 – 4:15 p.m. in Gerlach Hall 305

Office Hours: By appointment

Office: 306 Fisher Hall **Email:** sheridan.146@osu.edu

Course Description:

This hands-on course covers the application of financial software tools. You will be exposed to real world applications used in corporate finance, investment banking, and asset management. You will source and analyze real-time market data relating to various finance topics such as: forecasting, project analysis, capital budgeting, financial statement analysis, intrinsic valuation, and portfolio management.

Course Objectives:

This course will utilize Bloomberg, S&P Capital IQ, Morningstar, Excel, and other financial market data software. The course objectives include:

- Efficiently find and download financial data
- Ability to analyze and manipulate data
- Deal with uncertainty and imperfect information
- Draw conclusions based on data analysis

Text and Materials: All Course Materials will be posted on Carmen (this class does not have a required text)

The following schedule is tentative and subject to change based on how the class progresses.

Week	Topic	Assignment
1	Introductions & course overview Current state of the financial markets illustrated by market data	
2	Library Datasets Bloomberg Introduction & Navigation	
3	9/5 Labor Day (No Class) Bloomberg Functionality: News & Industry	
4	Bloomberg Functionality: Equity & Fixed Income	BMC Due 9/18
5	Investing & Fund Analysis Morningstar & Bloomberg Portfolio Analytics	
6	Industry & Company Analysis Project Presentations Capital IQ	Industry & Company Analysis Project Due
7	Bloomberg Functionality: FX & Commodities Bloomberg Excel Formulas	
8	Refinitiv Eikon Final Project Presentations	401K Mutual Fund Evaluation Project Due

Course Format:

This class meets twice per week. Regular class attendance is expected. Please feel free to ask questions during lecture. I will use Carmen to distribute emails to the class and post supplemental information.

Grading:

Bloomberg Market Concepts	10%
Individual Data Assignments	20%
Industry & Company Analysis Project	30%
401K Mutual Fund Evaluation Project	40%

No extra credit offered. Grades will be determined at the end of the term. Any curve, if there is one, is set at that time.

Bloomberg Market Concepts:

The BMC is a 10-hour, self-paced e-learning course that provides an interactive introduction to the financial markets. BMC consists of 5 modules—Economic Indicators, Currencies, Fixed Income, Equities, and Getting Started on the Terminal—woven together from Bloomberg data, news, analytics and television.

Projects:

In-depth instructions will be posted on Carmen and will be covered in class.

Individual Data Assignments:

In-depth instructions and due dates will be posted on Carmen and will be covered in class.

Academic Integrity Policy

Academic integrity is essential to maintaining an environment that fosters excellence in teaching, research, and other educational and scholarly activities. Thus, The Ohio State University and the Committee on Academic Misconduct (COAM) expect that all students have read and understand the university's [Code of Student Conduct](http://studentconduct.osu.edu) (studentconduct.osu.edu), and that all students will complete all academic and scholarly assignments with fairness and honesty. Students must recognize that failure to follow the rules and guidelines established in the university's *Code of Student Conduct* and this syllabus may constitute "Academic Misconduct."

The Ohio State University's *Code of Student Conduct* (Section 3335-23-04) defines academic misconduct as: "Any activity that tends to compromise the academic integrity of the university or subvert the educational process." Examples of academic misconduct include (but are not limited to) plagiarism, collusion (unauthorized collaboration), copying the work of another student, and possession of unauthorized materials during an examination. Ignorance of the university's *Code of Student Conduct* is never considered an excuse for academic misconduct, so I recommend that you review the *Code of Student Conduct* and, specifically, the sections dealing with academic misconduct.

If I suspect that a student has committed academic misconduct in this course, I am obligated by university rules to report my suspicions to the Committee on Academic Misconduct. If COAM determines that you have violated the university's *Code of Student Conduct* (i.e., committed academic misconduct), the sanctions for the misconduct could include a failing grade in this course and suspension or dismissal from the university.

If you have any questions about the above policy or what constitutes academic misconduct in this course, please contact me.

Other sources of information on academic misconduct (integrity) to which you can refer include:

- [Committee on Academic Misconduct](https://go.osu.edu/coam) (go.osu.edu/coam)
- [Ten Suggestions for Preserving Academic Integrity](https://go.osu.edu/ten-suggestions) (go.osu.edu/ten-suggestions)
- [Eight Cardinal Rules of Academic Integrity](https://go.osu.edu/cardinal-rules) (go.osu.edu/cardinal-rules)

Copyright for Instructional Materials

The materials used in connection with this course may be subject to copyright protection and are only for the use of students officially enrolled in the course for the educational purposes associated with the course. Copyright law must be considered before copying, retaining, or disseminating materials outside of the course.

Creating an Environment Free from Harassment, Discrimination, and Sexual Misconduct

The Ohio State University is committed to building and maintaining a community to reflect diversity and to improve opportunities for all. All Buckeyes have the right to be free from harassment, discrimination, and sexual misconduct. Ohio State does not discriminate on the basis of age, ancestry, color, disability, ethnicity, gender, gender identity or expression, genetic information, HIV/AIDS status, military status, national origin, pregnancy (childbirth, false pregnancy, termination of pregnancy, or recovery therefrom), race, religion, sex, sexual orientation, or protected veteran status, or any other bases under the law, in its activities, academic programs, admission, and employment. Members of the university community also have the right to be free from all forms of sexual misconduct: sexual harassment, sexual assault, relationship violence, stalking, and sexual exploitation.

To report harassment, discrimination, sexual misconduct, or retaliation and/or seek confidential and non-confidential resources and supportive measures, contact the Office of Institutional Equity:

Online reporting form at equity.osu.edu,
Call 614-247-5838 or TTY 614-688-8605,
Or email equity@osu.edu

Your Mental Health

As a student you may experience a range of issues that can cause barriers to learning, such as strained relationships, increased anxiety, alcohol/drug problems, feeling down, difficulty concentrating and/or lack of motivation. These mental health concerns or stressful events may lead to diminished academic performance or reduce a student's ability to participate in daily activities. No matter where you are engaged in distance learning, The Ohio State University's Student Life Counseling and Consultation Service (CCS) is here to support you. If you find yourself feeling isolated, anxious or overwhelmed, [on-demand mental health resources](https://go.osu.edu/ccsondemand) (go.osu.edu/ccsondemand) are available. You can reach an on-call counselor when CCS is closed at [614- 292-5766](tel:614-292-5766). **24-hour emergency help** is available through the [National Suicide Prevention](https://www.nationalsuicidepreventionhelpline.org)

[Lifeline website](https://suicidepreventionlifeline.org) (suicidepreventionlifeline.org) or by calling [1-800-273-8255\(TALK\)](tel:1-800-273-8255). [The Ohio State Wellness app](#)

Accessibility Accommodations for Students with Disabilities

The university strives to make all learning experiences as accessible as possible. If you anticipate or experience academic barriers based on your disability including mental health, chronic or temporary medical conditions, please let me know immediately so that we can privately discuss options. To establish reasonable accommodations, I may request that you register with [Student Life Disability Services \(SLDS\)](#). After registration, make arrangements with me as soon as possible to discuss your accommodations so that they may be implemented in a timely fashion.

Student COVID-related Accommodation Process:

The university is committed to supporting students and program participants with COVID-19 based risk factors. Student Life Disability Services, in conjunction with the Office of Institutional Equity, will work with students who are vulnerable to complications from COVID-19 to ensure that they have the necessary resources to participate in university life as safely as possible. Ohio State students from any campus may submit a [COVID-related accommodation request](#). Students registered with Student Life Disability Services can work directly with their [assigned Access Specialist](#) to modify their accommodations or make additional COVID-based accommodation requests.

Disability Services Contact Information

- Phone: [614-292-3307](tel:614-292-3307)
- Website: slds.osu.edu
- Email: slds@osu.edu
- In person: [Baker Hall 098, 113 W. 12th Avenue](#)

Safety and health requirements

All teaching staff and students are required to comply with and stay up to date on all [University safety and health guidance](#).

Disenrollment:

Any student who fails to attend without giving prior notification to the instructor will be disenrolled after the third instructional day of the term, the first Friday of the term, or the second scheduled class meeting of the course, whichever occurs first, per OSU attendance policy.

Credit hours and work expectations: This is a 1.5 credit-hour course. According to [Ohio State bylaws on instruction](#) (go.osu.edu/credithours), students spend two hours outside of class for every hour spent in class. Since this course meets 3 hours per week, you should expect to spend 6 hours per week outside of class on course-related work. Thus, you should be spending at least six hours per week outside of class on this course alone. That time should be spent reading the required material, taking notes on what you were reading, reviewing lecture notes, meeting with class colleagues in going over what you have learned, working on homework problems, reading current investment news.