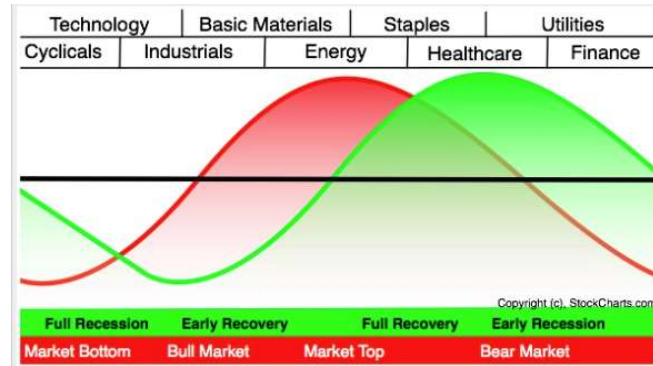




Portfolio Management

ECON SIP CERTIFICATE COURSE x499.4

COURSE DESCRIPTION: Managing portfolios in the face of economic fluctuations can be one of the most vexing challenges facing decision makers. This is particularly so when considering how unexpected shifts can prompt costly decline of even the best laid business plans. This course employs actual case studies to explore how business cycles influence economic activity and portfolio performance, which industrial sectors make the most sense and which to avoid at given stages, and how indicators can help us identify what current cycle phase may prevail.

COURSE GOALS: By the end of this course, you will:

- Understand business cycles and investment adjustments that can capitalize on them
- Know how indicators and yield curves can help to determine current cycle phase
- Understand risk on vs risk off and investment implications
- Learn how these factors contribute to portfolio construction and management

REQUIRED READINGS (All Available on Gaucho Space)

GRADING: 25% Class Participation, Case Study Presentations, Homework & Final Exam

THEORY READINGS

- Basis for Instructor Lectures & Discussion
- Required Readings Posted on Canvas

APPLICATION CASE STUDIES

- ALL STUDENTS Team "Fast Pitch"
- Case Studies Posted on Canvas

Foundational

- Wk1 What Are Business Cycles?
- Wk2 Where Are We in Cycle & Yield Curves
- Wk3 What Are the ABC's of Investing?
- Wk4 What Are ETF's & Index Strategies?
- Wk5 What are Style & Cap Strategies?
- Wk6 What Are Sector Strategies?
- Wk7 How Can Portfolio's Be Constructed & Managed?
- Wk8 How Can Portfolio's Be Constructed & Managed?

Strategic

- CS#1 Macro Diagnostic Focus (In Class)
- CS#2 Macro Diagnostic Focus
- CS#3 Macro Diagnostic Focus
- CS#4 ETF Selection Focus
- CS#5 Equity Style & Cap Focus
- CS#6 Sector Focus
- CS#7 Portfolio Construction with Growth Focus
- CS#8 Portfolio Construction with Income Focus

FINAL