

INVESTMENT SCIENCE AND PORTFOLIO MANAGEMENT CONCENTRATION

The investment science and portfolio management concentration provides theoretical and practical application of security analysis, asset pricing, and dynamic portfolio management for students interested in the investment management field. Students will have the opportunity to apply theoretical models discussed in class by managing funds in the student managed investment club. Students are encouraged to actively participate in the club early in their academic career.

The completion of specified courses in business finance, banking, and investment science and portfolio management may be applied toward concentration requirements in all three areas.

Investment Science and Portfolio Management concentration and secondary concentration students are required to earn a "C+" or better in FNBK 3250 and FNBK 3300.

BSBA Degree with Investment Science and Portfolio Management Concentration Requirements

| Code | Title | Credits |
|---|---|-----------|
| General Education Requirements - 34 Hours Required | | |
| Fundamental Skills | | 15 |
| Writing – 6 hrs. | | |
| ENGL 1150 | ENGLISH COMPOSITION I | |
| ENGL 1160 | COLLEGE RESEARCH AND INFORMATION LITERACY | |
| Oral Communication – 3 hrs. | | |
| CMST 1110 | PUBLIC SPEAKING FUNDS | |
| or CMST 2120 | ARGUMENTATION AND DEBATE | |
| Quantitative Literacy – 3 hrs. | | |
| MATH 1120 | INTRODUCTION TO MATHEMATICAL AND COMPUTATIONAL THINKING | |
| or MATH 1130 | QUANTITATIVE LITERACY | |
| or MATH 1140 | QUANTITATIVE REASONING FOR HEALTHCARE PROFESSIONALS | |
| or MATH 1300 | COLLEGE ALGEBRA WITH SUPPORT | |
| Data Literacy – 3 hrs. | | |
| Select one from the following: | | |
| STAT 1100 | DATA LITERACY AND VISUALIZATION | |
| STAT 1530 | ELEMENTARY STATISTICS | |
| Until Fall 2028, students can satisfy this requirement with an approved data literacy course, or any approved natural or social science general education course. | | |
| Breadth of Knowledge | | 13 |
| Social Science – 3 hrs. | | |
| Humanities – 3 hrs. | | |
| Natural & Physical Science (must complete a lab) – 4 hrs. | | |
| Arts – 3 hrs. | | |
| Individual and Social Responsibility | | 6 |

Cultural Knowledge – 3 hrs.

Civic Knowledge and Engagement – 3 hrs.

MAJOR REQUIREMENTS - 69 Hours Required

Must complete all MAJOR REQUIREMENTS with a grade of C (2.0) or higher

**Course will satisfy UNO's General Education requirement

^Course requires pre-requisite(s)

All of the following:

| | |
|-----------|--|
| ENGL 1150 | ENGLISH COMPOSITION I (** ^) |
| ENGL 1160 | COLLEGE RESEARCH AND INFORMATION LITERACY (** ^) |
| CMST 1110 | PUBLIC SPEAKING FUNDS (**) |

Select 1 of the Following **3**

| | |
|-----------|--|
| MATH 1370 | APPLIED ALGEBRA AND OPTIMIZATION WITH DATA ANALYSIS (^) |
| MATH 1930 | CALCULUS FOR THE MANAGERIAL, LIFE, AND SOCIAL SCIENCES (^) |

All of the Following **45**

| | |
|-----------|---|
| ECON 2200 | PRINCIPLES OF ECONOMICS (MICRO) (** ^) |
| ECON 2220 | PRINCIPLES OF ECONOMICS (MACRO) (** ^) |
| BSAD 2130 | PRINCIPLES OF BUSINESS STATISTICS (^) |
| ACCT 2010 | PRINCIPLES OF ACCOUNTING I (^) |
| ACCT 2020 | PRINCIPLES OF ACCOUNTING II (^) |
| MKT 3200 | BUSINESS COMMUNICATIONS (^) |
| MKT 3310 | PRINCIPLES OF MARKETING (^) |
| MGMT 3490 | MANAGING PEOPLE AND ORGANIZATIONS (^) |
| LAWS 3930 | BUSINESS LAW FUNDAMENTALS (^) |
| FNBK 3250 | PRINCIPLES OF FINANCIAL MANAGEMENT (^) |
| MGMT 3100 | MANAGEMENT INFORMATION SYSTEMS (^) |
| SCMT 3500 | MANAGING OPERATIONS IN THE SUPPLY CHAIN (^) |
| MGMT 4480 | CORPORATE AND BUSINESS STRATEGY (^) |

*INTERNATIONAL DIMENSION - 3 hrs

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*Students must complete at least six hours of course work beyond the general education Cultural Knowledge requirement with a global perspective. A list of approved International Dimension courses can be found on the student's degree audit.

Select 1 of the Following **3**

| | |
|-----------|--|
| CMST 2120 | ARGUMENTATION AND DEBATE (**) |
| CMST 3130 | SPEECH COMMUNICATION IN BUSINESS AND THE PROFESSIONS (^) |
| CMST 3140 | CONTEMPORARY PRESENTATIONS (^) |
| CMST 3150 | INTERCOLLEGIATE FORENSICS I (^) |
| CMST 3160 | INTERCOLLEGIATE FORENSICS II (^) |
| MKT 3100 | PROFESSIONAL SELLING (^) |

Investment Science and Portfolio Management Concentration Courses

All of the Following **15**

| | |
|-----------|---------------------------------------|
| FNBK 3000 | FINANCIAL REPORTING AND ANALYSIS (^) |
| FNBK 3300 | INTERMEDIATE FINANCIAL MANAGEMENT (^) |

| | | |
|----------------------------------|--|----------|
| FNBK 3400 | INVESTMENT PRINCIPLES AND PRACTICES (^) | |
| FNBK 3500 | FINANCIAL MARKETS (^) | |
| FNBK 3700 | INTERNATIONAL FINANCIAL MANAGEMENT (^) | |
| Select 1 of the Following | | 3 |
| FNBK 3330 | ENTREPRENEURIAL FINANCE (^) | |
| FNBK 3650 | COMMERCIAL BANK MANAGEMENT (^) | |
| FNBK 4150 | ADVANCED FINANCIAL MANAGEMENT (^) | |
| FNBK 4210 | SELLING FINANCIAL SERVICES (^) | |
| FNBK 4300 | FUNDAMENTALS OF FINANCIAL PLANNING | |
| FNBK 4470 | BEHAVIORAL FINANCE & INVESTING (^) | |
| FNBK 4500 | SPECIAL PROBLEMS IN FINANCE AND BANKING (^) | |
| FNBK 4510 | FINANCE AND BANKING INTERNSHIP (^) | |
| FNBK 4570 | INVESTMENT MANAGEMENT FOR FINANCIAL ANALYSTS (^) | |
| FNBK 4590 | INSURANCE PLANNING (^) | |
| FNBK 4610 | PORTFOLIO MANAGEMENT (^) | |
| RELU 4390 | REAL ESTATE INVESTMENTS (^) | |

ELECTIVES

Elective hours as required to reach a total of 120 hours

Secondary Concentration in Investment Science and Portfolio Management Requirements

| Code | Title | Credits |
|-----------------------------|-------------------------------------|-----------|
| All of the Following | | 12 |
| FNBK 3300 | INTERMEDIATE FINANCIAL MANAGEMENT | |
| FNBK 3400 | INVESTMENT PRINCIPLES AND PRACTICES | |
| FNBK 3XXX OR FNBK 4XXX | | |
| FNBK 3XXX OR FNBK 4XXX | | |

BSBA Degree with Investment Science and Portfolio Management Concentration Four Year Plan

Freshman

| | | |
|--------------------------------------|--|----------------|
| Fall | | Credits |
| ENGL 1150 | ENGLISH COMPOSITION I ¹ | 3 |
| MATH 1300 | COLLEGE ALGEBRA WITH SUPPORT ² | 4 |
| CMST 1110 | PUBLIC SPEAKING FUNDS | 3 |
| General Education Course or Elective | | 3 |
| BSAD 1100 | BUSINESS MAVERICKS: COLLEGE AND CAREER FOUNDATIONS (Recommended) | 1 |
| Credits | | 14 |
| Spring | | |
| ENGL 1160 | COLLEGE RESEARCH AND INFORMATION LITERACY | 3 |

| | | |
|--------------------------------------|---|---|
| MATH 1370 | APPLIED ALGEBRA AND OPTIMIZATION WITH DATA ANALYSIS | 3 |
| ECON 2200 | PRINCIPLES OF ECONOMICS (MICRO) | 3 |
| General Education Course or Elective | | 3 |
| General Education Course or Elective | | 3 |

Credits 15**Sophomore****Fall**

| | | |
|--------------------------------------|---------------------------------|---|
| MKT 3200 | BUSINESS COMMUNICATIONS | 3 |
| ACCT 2010 | PRINCIPLES OF ACCOUNTING I | 3 |
| ECON 2220 | PRINCIPLES OF ECONOMICS (MACRO) | 3 |
| General Education Course or Elective | | 4 |
| General Education Course or Elective | | 3 |

Credits 16**Spring**

| | | |
|--------------------------------------|-----------------------------------|---|
| ACCT 2020 | PRINCIPLES OF ACCOUNTING II | 3 |
| BSAD 2130 | PRINCIPLES OF BUSINESS STATISTICS | 3 |
| MKT 3310 | PRINCIPLES OF MARKETING | 3 |
| MGMT 3490 | MANAGING PEOPLE AND ORGANIZATIONS | 3 |
| General Education Course or Elective | | 3 |

Credits 15**Junior****Fall**

| | | |
|--------------------------------------|---|---|
| FNBK 3250 | PRINCIPLES OF FINANCIAL MANAGEMENT ³ | 3 |
| LAWS 3930 | BUSINESS LAW FUNDAMENTALS | 3 |
| Second Speech ⁴ | | 3 |
| General Education Course or Elective | | 3 |
| Elective | | 3 |

Credits 15**Spring**

| | | |
|-------------------------|--|---|
| FNBK 3000 | FINANCIAL REPORTING AND ANALYSIS | 3 |
| FNBK 3300 | INTERMEDIATE FINANCIAL MANAGEMENT ⁵ | 3 |
| MGMT 3100 | MANAGEMENT INFORMATION SYSTEMS | 3 |
| International Dimension | | 3 |
| Elective | | 3 |

Credits 15**Senior****Fall**

| | | |
|-------------------------|---|---|
| FNBK 3500 | FINANCIAL MARKETS | 3 |
| FNBK 3700 | INTERNATIONAL FINANCIAL MANAGEMENT | 3 |
| SCMT 3500 | MANAGING OPERATIONS IN THE SUPPLY CHAIN | 3 |
| International Dimension | | 3 |
| Elective | | 3 |

Credits 15**Spring**

| | | |
|----------------------------|-------------------------------------|---|
| MGMT 4480 | CORPORATE AND BUSINESS STRATEGY | 3 |
| FNBK 3400 | INVESTMENT PRINCIPLES AND PRACTICES | 3 |
| FNBK Elective ⁶ | | 3 |
| Elective | | 3 |

| | |
|----------------------|------------|
| Elective | 3 |
| Credits | 15 |
| Total Credits | 120 |

- ¹ Requires English Composition Placement
- ² This course may or may not be required depending on Math Placement.
- ³ Students with an Investment Science & Portfolio Management concentration must earn a grade of "C+" or better in FNBK 3250.
- ⁴ For this requirement students must choose from the following list: MKT 3100, CMST 2120, CMST 3130, CMST 3140, CMST 3150, or CMST 3160.
- ⁵ Students with an Investment Science & Portfolio Management concentration must earn a grade of "C+" or better in FNBK 3300.
- ⁶ See DegreeWorks or Stellic for approved elective options.

This roadmap is a suggested plan of study and does not replace meeting with an advisor. Please note that students may need to adjust the actual sequence of courses based on course availability. Please consult an advisor in your major program for further guidance.

This plan is not a contract and curriculum is subject to change

Additional Information About this Plan:

University Degree Requirements: The minimum number of hours for a UNO undergraduate degree is 120 credit hours. Please review the requirements for your specific program to determine all requirements for the program. In order to graduate on-time (four years for an undergraduate degree), you need to take 30 hours each year.

Placement Exams: For Math, English, Foreign Language, a placement exam may be required. More information on these exams can be found at <https://www.unomaha.edu/enrollment-management/testing-center/placement-exams/information.php>

****Transfer credit or placement exam scores may change suggested plan of study**

GPA Requirements:

Courses within the College of Business require students to obtain a minimum NU GPA of 2.5 or better.

Graduation Requirements:

- Students must earn a minimum of 120 credit hours for a BSBA.
- 42 of those credit hours must be in upper division courses.
- For a BSBA business core, BSBA concentration, or business elective course to fulfill BSBA requirements, it must be taken on a letter-grade basis and the student must earn a grade of "C" (2.0) or higher.
- CBA students must earn a minimum NU GPA of 2.50 and a minimum Business GPA of 2.50. If students are earning an accounting concentration or secondary concentration, a minimum upper division accounting GPA of 2.50 is additionally required.