The Graduate Certificate in Investment Management provides students with the knowledge and skills necessary to manage a balanced (fixed income and equity) investment fund. Those completing the certificate will gain a substantial competitive edge in pursuing a career as a financial analyst or investment advisor, and will have an outstanding foundation to become an investment portfolio manager, chief investment officer, or independent financier.

The curriculum features a broad spectrum of investment-related subjects, with an emphasis on intensive research and applied training in complex financial tools and techniques. The program also includes a professional internship. Central to the curriculum is the David O. Nicholas Applied Finance Lab, which is equipped with state-of-the-art professional databases, streaming financial news and financial software, replicating the technology and real-time market data, analysis, and news available to professional traders in investment firms.

Eligibility

The Graduate Certificate in Investment Management begins in Fall terms. Admission to the Certificate is competitive, based on cumulative GPA, grades earned in BUS ADM 721 and BUS ADM 771, and a personal statement. Students will submit an online application at lubar.uwm.edu/imcp during the semester all admission requirements are met.
Required Courses (18 credits)

BUS ADM 552 Investment Management Practice I
Introduction to the real-time and historic data sets available in the David O. Nicholas Applied Finance Lab. Utilize Bloomberg, FactSet, and other analysis packages. Prereq: grad st, admis to Investment Mgmt Cert program and BUS ADM 301(c) or 721(c) and 771(c).

BUS ADM 553 Investment Management Practice II
Students manage an investment portfolio utilizing the David O. Nicholas Applied Finance Lab. Topics include securities selection, portfolio hedging, behavioral finance, and financial market events. Prereq: grad st, admis to Investment Mgmt Cert program and BUS ADM 552.

BUS ADM 554 Investment Management Practice III
Students independently conduct special study to assist individual future professional development and gain maturity and confidence in real world investment management. Prereq: grad st, admis to Investment Mgmt Cert program and BUS ADM 553.

BUS ADM 772 Portfolio Management
Study of dynamic process that periodically matches investors’ goals, objectives, and strategies with market expectations through portfolio construction and revision. Covers asset allocation, return optimization, and management of various asset types. Prereq: grad st; BUS ADM 771.

BUS ADM 773 Options and Futures
Pricing theories and models for options and futures contracts and their application to investment hedging, arbitrage, and portfolio management. Covers equity, fixed income, commodity, and currency options and futures. Prereq: grad st; BUS ADM 771.

BUS ADM 851 Global Investments
Introduce market structure, institutions, regulations, instruments, and innovations in global investments. Focus on management of foreign currency risk and performance of global investment portfolios. Prereq: grad st; BUS ADM 771.

Course Sequencing (3 semesters)

The certificate is offered in a structured three-semester sequence beginning in Spring terms.

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<thead>
<tr>
<th>Semester</th>
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<tbody>
<tr>
<td>Spring I</td>
<td>BUS ADM 552</td>
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<td>BUS ADM 772</td>
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<td>Fall</td>
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<td>BUS ADM 773</td>
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<td>Spring II</td>
<td>BUS ADM 554</td>
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<td>BUS ADM 851</td>
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Internships
Students completing the certificate are required to have an internship experience prior to graduation from the certificate program. The internship experience must be approved by the IMCP director.

Certificate Completion
Students must complete the six Certificate courses within a three-year time limit with a minimum 3.0 GPA. While the Certificate comprises 18 credits, a maximum of nine Certificate credits may be counted toward earning both credentials, i.e., the Certificate and the MBA or MS degree.

For Further Information:
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