

Using Bloomberg Terminals in a Security Analysis and Portfolio Management Course

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ABSTRACT

Motivated by an obvious gap between the widespread use of Bloomberg terminals in the finance industry and the scant resources available to an instructor on how to incorporate the available information through the terminal into a finance course, we illustrate our experience using the terminal in an equity-focused security analysis and portfolio management course. Our goal is to enable students inexperienced with the terminal to prepare an analyst report. We identify the most significant challenges we face and provide the corresponding solutions. Our results are also applicable to other finance courses including financial analysis, investments, and student managed investment fund.

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