



SYLLABUS

CATALOG DESCRIPTION

Provides a practical education in the research and analysis of common investments such as stocks, bonds, mutual funds, and some derivatives including put and call options on equities. The course will also cover risk and reward, proper portfolio management and diversification, time value of money, operation of the investment markets, and the economics surrounding various investment options. Students will be involved with simulated stock, mutual fund, and option competitions.

Semester Offered: Fall, Spring

Common Student Learning Outcomes

Upon successful completion of San Juan College programs and degrees, the student will demonstrate competency in...

BROAD AND SPECIALIZED LEARNING

Students will actively and independently acquire, apply, and adapt skills and knowledge with an awareness of global contexts.

CRITICAL THINKING

Students will think analytically and creatively to explore ideas, make connections, draw conclusions and solve problems.

CULTURAL AND CIVIC ENGAGEMENT

Students will act purposefully, reflectively, and ethically in diverse and complex environments.

EFFECTIVE COMMUNICATION

Students will exchange ideas and information with clarity in multiple contexts.

INFORMATION LITERACY

Students will be able to recognize when information is needed and have the ability to locate, evaluate, and use it effectively.

INTEGRATING TECHNOLOGIES

Students will demonstrate fluency in the application and use of technologies in multiple contexts.

Student work from this class may be randomly selected and used anonymously for assessment of course, program, and/or institutional learning outcomes. For more information, please refer to the Dean of the appropriate School.

Course Learning Outcomes

Upon successful completion of the course, the student will be able to understand...

1. Investment Basics

- 1.1. What is investment?
- 1.2. The rewards of investment
- 1.3. Stock markets
- 1.4. Buying and selling shares

2. The Investment Spectrum

- 2.1. Pooled investments
- 2.2. Bonds
- 2.3. Options
- 2.4. Futures
- 2.5. Spread betting, contracts for difference and warrants

3. Company Analysis

- 3.1. Company accounts
- 3.2. Key investment ratios and measures
- 3.3. Some of the tricks of the accounting trade
- 3.4. Analyzing industries
- 3.5. The competitive position of the firm

4. Managing Your Portfolio

- 4.1. Companies issuing shares.
- 4.2. Taxation and investors
- 4.3. Mergers and takeovers
- 4.4. Investor protection
- 4.5. Measuring performance: indices and risk
- 4.6. Investment clubs