

# BUS 0216 - INVESTMENTS

## Catalog Description

Formerly known as BUS 19

Advisory: Completion of BUS 201 and BUS 202 or BUS 215 with grade of "C" or better

Hours: 54 lecture

Description: Introduction to investment opportunities, principles and practices. Includes investments in government and corporate securities, mutual funds, real estate, and tax advantaged securities. (CSU)

## Course Student Learning Outcomes

- CSLO #1: Evaluate the role of investments in capital markets and the impact of historical investments as they relate to current investment options.
- CSLO #2: Compare and contrast different investment securities and mutual funds options using current investment information.
- CSLO #3: Analyze the risks, characteristics and ethical implications of accurate financial information in regards to making an investment decision.

## Effective Term

Fall 2022

## Course Type

Credit - Degree-applicable

## Contact Hours

54

## Outside of Class Hours

108

## Total Student Learning Hours

162

## Course Objectives

Through written activities and computations, the student will:

1. Evaluate the role of investments in capital markets.
2. Evaluate the impact historical investment markets have had on current investment options.
3. Compare and contrast different investment securities options.
4. Analyze investment information to make recommendations.
5. Evaluate and apply risk of investments to individual investors.
6. Analyze financial information to determine the viability of investing in stock of a company.
7. Compare and contrast the different mutual funds available with regards to management, historical performance, and pricing.
8. Compare and contrast the characteristics of different tax-advantaged investments.

## General Education Information

- Approved College Associate Degree GE Applicability
- CSU GE Applicability (Recommended-requires CSU approval)

- Cal-GETC Applicability (Recommended - Requires External Approval)
- IGETC Applicability (Recommended-requires CSU/UC approval)

## Articulation Information

- CSU Transferable

## Methods of Evaluation

- Classroom Discussions
  - Example: Choose an article about a company from a website such as Yahoo Finance and comment on the possible short and long term effects of the company's stock related to the information in the article. Grading based on participation.
- Essay Examinations
  - Example: Explain Warren Buffet's methodology on investing. Would his methodology be consistent with a conservative or aggressive investor? Rubric grading.
- Objective Examinations
  - Example: Investing in an index fund is a form of: a. active investing b. passive investing c. option investing d. futures investing
- Skill Demonstrations
  - Example: Given a client's information, prepare an investment portfolio related to the risk tolerance of that client. Rubric grading.

## Repeatable

No

## Methods of Instruction

- Lecture/Discussion
- Distance Learning

Lecture:

1. Instructor lectures on the impact historical investments markets have had on the current markets. Students are to actively engage in the lecture and site major events. (Objective 2)
2. Instructor guides students to analyze research findings on the risk/reward of investing in a particular stock. (Objective 5)

Distance Learning

1. Following an online lecture on brokerage firms, students will research online brokerage firms and choose one that they think has the lowest cost. On the discussion board, explain how you came to your conclusion including the ease of use in researching market data. (Objective 7)

## Typical Out of Class Assignments Reading Assignments

1. Students read the chapter that covers common stock investments and be prepared to discuss in class. 2. Each week, students read an article from the Wall Street Journal, Business Week, Sacramento Bee business section, or other financial news source and be prepared to discuss in class.

## **Writing, Problem Solving or Performance**

1. Students write a report on the stock analysis of a selected company based on discussions in class and the assigned reading. 2. Students write a one-page paper summarizing the accomplishments of Warren Buffet.

## **Other (Term projects, research papers, portfolios, etc.)**

### **Required Materials**

- Fundamentals of Investing
  - Author: Gitman
  - Publisher: Pearson
  - Publication Date: 2017
  - Text Edition: 13th
  - Classic Textbook?: No
  - OER Link:
  - OER:

**Other materials and-or supplies required of students that contribute to the cost of the course.**