

**BA 34- 56017: Investment Fundamentals Course Syllabus: Spring 2020**

**Instructor: Dr. Sarah Maokosy**

**Contact Information:**

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**Meeting Times/Location: Web: Canvas @ no specific time each week**

**OFFICE HOURS:**

**TBA**

**Important Dates:**

- **January 13 (M) Start of Spring 2020 semester**
- **January 13 - March 13 (M-F) Short-term classes, first nine weeks**
- **January 20 (M) Martin Luther King, Jr. Day observed (no classes held, campus closed)**
- **January 24 (F) Last day to drop a Spring 2020 full-term class for full refund**
- **January 31 (F) Last day to register for a Spring 2020 full-term class in person**
- **January 31 (F) Last day to drop a Spring 2020 full-term class to avoid a “W” in person**
- **February 2 (SU) Last day to drop a Spring 2020 full-term class to avoid a “W” on WebAdvisor**
- **February 21 (F) Last day to change a Spring 2020 class to/from Pass/No-Pass grading basis**
- **February 14 (F) Lincoln Day observance (no classes held, campus closed)**
- **February 17 (M) Washington Day observance (no classes held, campus closed)**
- **March 13 (F) Last Day to drop a full-term class (letter grades assigned after this date)**
- **March 16 - May 22 (M-F) Short-term classes, second nine weeks**
- **April 6-9 (M-Th) Spring recess (no classes held, campus open)**
- **April 10 (F) Good Friday observance (no classes held, campus closed) (classes reconvene April 13)**
- **May 18-22 (M-F) Spring 2020 final exams week**
- **May 22 (F) End of Spring 2020 semester/commencement**
- **May 25 (M) Memorial Day holiday (campus closed)**

**Course Description:** Understanding and evaluating stocks, bonds, mutual funds, real estate, insurance, collectors' items, commodities, and other alternatives as investment and retirement planning instruments. Personal portfolio management, retirement plans, lump-sum distributions, and related strategies for investing and retirement planning will be explored.

**Prerequisites:** None. Advisories include: Eligibility for ENGL 125 & 126 and MATH 101

**Course Outline:**

Week 1- Chapter 1  
Week 2- Chapter 2  
Week 3- Chapter 3  
Week 4- Chapter 4  
Week 5- Chapters 5 & 6  
Week 6- Chapter 7  
Week 7- Chapters 8 & 9  
Week 8- Chapters 10 & 11  
Week 9- Midterm Chs. 1-11  
Week 10- Chapters 12 & 13  
Week 11- Chapter 14  
Week 12- Chapters 15 & 16  
Week 13- Chapter 17  
Week 14- Chapters 18 & 19  
Week 15- Chapter 20  
Week 16- Chapter 21  
Week 17- Chapter 22  
Week 18- Final Chs. 1-22

**Learning Objectives & Outcomes:**

**In the process of completing this course, students will:**

- understand and demonstrate the concept of risk and return.
- locate, analyze, and utilize sources of information available to investors.
- identify, compare, and contrast the mechanics and concepts of investment analysis.
- identify, appraise, and examine the important differences among financial instruments/institutions.
- recognize and differentiate significant factors in investing analysis.
- manage an investment portfolio.
- identify, analyze, and evaluate financial statements.

**Upon completion of this course, students will be able to:**

- examine, analyze, and construct appropriate personal investment portfolios and plan the procedures used in evaluating risk/return as it relates to investments and retirement planning.
- examine and analyze financial institutions and financial instruments for retirement planning purposes using a variety of information sources.

- evaluate the time value of money, calculate the effect of inflation of investments, and appraise the effect taxes have on investment/retirement planning using modern investment analysis techniques.
- examine the differences between fundamental and technical analysis of investment instruments and formulate appropriate analysis models for public and private institutions.
- contrast and compare investment planning objectives as they relate to the timeline of retirement with an emphasis on age-appropriate investment instruments.
- successfully manage a stock portfolio.
- understand why investors succeed or fail in the various financial markets and use ratio analysis to analyze financial

### **Learning Methods & Course Activities:**

- Discussions based on course material
- Required readings
- Problem solving
- Internet Research
- Web simulation

**Assessment:** Students completing all exams, assignments, and activities with a cumulative, average grade of "C" or better will be deemed as having achieved the course objectives previously stated. Different weights are given to each category before calculating overall grades.

### **Textbooks:**

- Essentials of Investments by Bodie, Kane, & Marcus 11<sup>th</sup> Edition

### **Course Activities & Grade Weights:**

Participation/Discussions 25%

Homework/Projects 25%

Quizzes & Exams 25%

Final 25%

### **Percentage/Grade Breakdown:**

90 - 100% A

80 - 89.9% B

70 - 79.9% C

60 - 69.9% D

< 60% F

### **INTERNET & E-MAIL**

Access to broadband Internet is required. If you do not have an Internet connection, you may use the resources in the Reedley College Library or at other computer labs on campus.

#### **An email address is required for all students.**

If you do not already have one, please either obtain an email address through the RC Library – or any one of the many free email services out there (gmail, hotmail, etc.).

Please note: I teach multiple courses (and multiple sections of some courses) so I have some rather strict rules about email. They are as follows:

\*Use the subject line correctly. Each e-mail you send to me must include the following subject line:

#### **Course number, your first and last name, and the subject you are writing about**

*For example, if I was a student in BA 39 ( Finite Math), the subject line on my email would be as follows: BA 39 Sarah Maokosy Question about homework*

Use the spell checker.

Your e-mail messages represent you. Be accurate and be professional.

Use proper grammar.

Make a habit of constantly improving the way you communicate.

Do not type in all capital letters.

That is the same as yelling.

Please remember that you are in training for your professional career. One of the best places to start practicing is in this class.

\*if your e-mail does not have the required information in the subject line, your email will not be read.

## **CANVAS**

We will use Canvas for our class management system. You can log in through the Reedley College home page.

## **GRADING**

Your course grade will be based on the percentage of points (total earned / total possible), and grades are weighted based on type of assignment. Please see specific grading weights on page one of your course syllabus. Do not simply divide your total points earned by the total points possible. You must use the category weights when calculating your overall grade.

## **ATTENDANCE & PARTICIPATION (online classes)**

You are not expected to log on every day at a specific time. However, I may post extra credit assignments, announcements, assignment files, etc. so it is a good idea to get in the habit of logging into your Canvas page for your course on a daily basis.

Your attendance and participation will be graded based on the Discussion feature in Canvas. You are required to post an original response to each discussion prompt. You are also required to post at least one “follow-up” response to your classmates’ original postings (2 total posts for each discussion post). Please be thorough when you post, as menial posts may not be counted for credit.

Discussion prompts will be posted weekly. Some weeks may only have one prompt, while others may have two or three.

## **HOMEWORK, QUIZZES, & EXAM**

Homework assignments are a way for you to dig deeper into the course materials and prepare for the tests and exams. **Homework will not be accepted late.** Please do not e-mail homework assignments.

**Please make sure to submit assignments in Microsoft Office compatible form.** Assignments submitted in Word Perfect or other non-industry standard form will not be accepted.

Naming your assignments:

**Every homework assignment should be named using your name in the title of the assignment file.** For example: if I was submitting my Syllabus Hunt Assignment, I would name it:

SarahMaokosySyllabusHunt.doc

If your name is not in the title of the assignment, it takes much longer to grade because of the way Canvas is set up. As such, you will lose valuable points by not naming your files correctly.

If you are participating in school-sanctioned activities (sports, field trips, etc.) and find it necessary to miss class, it is your responsibility to make sure that all your work is turned in and tests/quizzes are taken prior to your departure. There will be no special dispensation for absences, homework & tests/quizzes missed.

Quiz dates and chapters to be covered are clearly identified each week. You will be required to complete quizzes and exams online. Accommodations will be made for students with disabilities.

**Grades are final unless an error in math is found in the computation of your grade.**

### **Drop Policy:**

If you decide to drop the course, please do not simply stop attending. In order to officially drop a class you must fill out a program change card, available in the Admissions and Records Office. Drop dates are listed in your Reedley College Class Schedule. If you simply stop attending, you will be assigned a letter grade.

### **Student Conduct:**

As stated in your schedule of courses, students are expected to conduct themselves in a responsible manner whenever they are on campus or representing the college in any activity. Board Policy 5410 states the specific rules and regulations and a copy of the policy is available in the college library, the admissions office, Dean of Students & Dean of Instruction offices as well as the student activities office.

Conduct standards are designed to perpetuate the college's educational purposes, allowing students to enjoy the right of freedom to learn. To that end, students who fail to meet the conduct standards, or who interfere with the rights of freedom to learn of others will be removed from class.

\*Ethics:

You will notice that we will often discuss ethical issues, as such you should understand that cheating and plagiarism is not acceptable in this class (or any other).

### **Accommodations for students with disabilities:**

If you have a verified need for an academic accommodation or materials in alternate media (i.e.: Braille, large print, electronic text, etc.) per the Americans with Disabilities Act (ADA) or Section 504 of the Rehabilitation Act, please contact me, or the **DSPS office - ext 3332** as soon as possible

\*Please see the Reedley College catalog for clarification of issues and additional guidelines.

### **General Guidelines for Online Classes:**

Discussion Boards: Each week, students will take part in discussions based on the topics covered in the text. In order to receive credit for discussion boards, students must complete original post plus two responses by Sunday before midnight (11:59PM)

Quizzes & Exams: You'll notice that there are time limits for taking quizzes and exams online. The time limits have been established to accurately assess a student who studies the material prior to completing the quiz/exam. Points will be taken from students who go over the time limit. This is to ensure that students do not have time to simply look up answers in the text. Please make sure to be prepared **before** taking a quiz/exam.

Submitting Assignments: Assignments will be accepted only through the Canvas system. There should be a link to submit each individual assignment. Do not use the Digital Drop Box. Do not e-mail your instructor assignments. Do not type or paste your assignments in Canvas. None of these will be accepted. Assignments will not be accepted late. Make sure to label assignments correctly.

Course Resources: Students who have oral presentation requirements should have access to equipment and software for recording and uploading video. This can be as simple as a webcam with microphone. Other students may decide to use a digital camera (video) and upload video. Either way is adequate.

Grading: Although assignment grades are posted on Canvas, calculations in Canvas are not always accurate with overall grades. Student grades are weighted by category.

Communication: You are welcome to e-mail me if you have questions or concerns. Please do so as early in the week as possible, as I generally do not log in to the system between Friday and Sunday. Unfortunately, sometimes we procrastinate and complete assignments close to deadlines, so if you do so and need help on a weekend, I probably will not be able to assist you in time. I will only be able to receive e-mails with the proper subject line, so make sure to check your syllabus to see what that means.

**THIS SYLLABUS AND THE COURSE ACTIVITIES SCHEDULE ARE SUBJECT TO CHANGE AS DEEMED NECESSARY BY THE INSTRUCTOR.**