

BUFI 013: INVESTMENT OPPORTUNITIES

Originator

promero

Co-Contributor(s)**Name(s)**

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Justification / Rationale

Update course to reflect the currently most effective mode of instruction as per outcome assessments.

Effective Term

Fall 2023

Credit Status

Credit - Degree Applicable

Subject

BUFI - Business/Finance

Course Number

013

Full Course Title

Investment Opportunities

Short Title

INVSTMNT OPPRTUNTIES

Discipline**Disciplines List**

Accounting

Modality

Face-to-Face

100% Online

Hybrid

Catalog Description

The course provides students with an understanding of the importance of investment in their personal finances as well as various investment opportunities available to them. It presents the features of different types of stocks, corporate bonds, government securities, mutual funds, options, futures, and real estate investments. It also offers students a set of tools and criteria for evaluating these investment instruments in light of their own financial conditions and objectives.

Schedule Description

This course is designed to make students familiar with a wide range of investment instruments including stocks, bonds, mutual funds and real estate. Students may choose the Pass/No Pass grading option.

Lecture Units

2

Lecture Semester Hours

36

Lab Units

1

Lab Semester Hours

54

In-class Hours

90

Out-of-class Hours

72

Total Course Units

3

Total Semester Hours

162

Prerequisite Course(s)

Advisory: ENG 061 and MATH 065

Required Text and Other Instructional Materials**Resource Type**

Book

Open Educational Resource

No

Author

Jack Kappor, Les Dlabay, Robert J. Hughes and Melissa Hart

Title

Personal Finance

Edition

14th

City

New York, New York

Publisher

McGraw Hill

Year

2023

College Level

Yes

ISBN #

9781264101597

Class Size Maximum

40

Requisite Course Objectives

ENG 061-Write essays that reflect critical thinking and clear expression, in a variety of rhetorical genres and for a variety of purposes.
ENG 061-Demonstrate a basic understanding of research-based writing, including the use of library resources to identify research sources.

MATH 065-Demonstrate proficiency in basic number facts (addition, subtraction, multiplication, division of integer numbers).

MATH 065-Compute using the four basic operations of addition, subtraction, multiplication, and division on the rational numbers in both fraction and mixed number forms.

MATH 065-Apply the basic operations to solve application problems that involve integer numbers, decimals, mixed numbers and rational numbers.

Course Content

1. Personal Finance
2. Investing Fundamentals
3. Time Value of Money
4. Investing in Stocks
5. Investing in Bonds
6. Investing in Mutual Funds
7. Primary Home
8. Investing in Real Estate and Other Investment Alternatives
9. Retirement Planning
10. Estate Planning

Lab Content

1. Portfolio

Course Objectives

Objectives	
Objective 1	Describe the importance of investment decisions in his/her finances.
Objective 2	Identify the range of investment opportunities available to him/her.
Objective 3	Track the performance of the financial markets, as well as individual investment instruments.
Objective 4	Develop his/her investment objectives and structure a simple investment portfolio consistent with those objectives.
Objective 5	Identify the complexity of some investment instrument, the risks involved, and the importance of professional advice in complex investment instruments.
Objective 6	Analyze economic and financial news and other information which affect investment markets.
Objective 7	Explain how to make more informed Investment decisions.

Student Learning Outcomes

Upon satisfactory completion of this course, students will be able to:	
Outcome 1	Identify key financial investment vehicles such as stocks, bonds or mutual funds.
Outcome 2	Analyze various investment opportunities by comparing and evaluating risk versus return.
Outcome 3	Apply various strategies in building a personal investment portfolio.

Methods of Instruction

Method	Please provide a description or examples of how each instructional method will be used in this course.
Lecture	Lecture on concepts with teacher demonstration of techniques followed by student lab practice and application to business problem.
Technology-based instruction	Simulations on market investment and research
Discussion	Class discussion
Collaborative/Team	Teacher presentation of specific technical problem with student teams developing and presenting potential solutions.
Laboratory	Comprehensive lab project on investment portfolio balancing.

Methods of Evaluation

Method	Please provide a description or examples of how each evaluation method will be used in this course.	Type of Assignment
Written homework	Homework assignments designed to measure student understanding of key concepts presented in each chapter and contribute to the overall understanding of the course material. Approximate time 3 hours per week.	Out of Class Only

Group activity participation/observation	a. Primarily a combination of MC, problem, and essay test and/or any other method deemed appropriate by the instructor. b. Completion and presentation to class of a comprehensive investment option(s) or equivalent as deemed appropriate by the instructor of the course.	In Class Only
Student participation/contribution	Class Discussion	In Class Only
Mid-term and final evaluations	Mid Term and Final Exams	In Class Only
Tests/Quizzes/Examinations	End Chapter Contains Assessments	In Class Only
Presentations/student demonstration observations	Student presentation on their portfolio choices vs results	In Class Only
Laboratory projects	Hands on exercise on preparing and monitor a portfolio using different investment types. Student will be expected to spend a minimum of 2 hours per week outside of the classroom researching the effects of the current topic into their budget. Also, updating, maintain and analyzing the consequence of their decision making process.	In and Out of Class

Assignments

Other In-class Assignments

Reading

1. Read assigned chapters in course text.
2. Read articles related to current issues related to market change and that correspond to topics being discussed in class.

Other Out-of-class Assignments

1. Read the assigned material and actively participate in class discussion of the topics.
2. Review and provide a critical evaluation of the information and trends in different investment instruments and markets.
3. Prepare a simple but complete investment portfolio with explanation in support of the portfolio.

Grade Methods

Letter Grade Only

Distance Education Checklist

Include the percentage of online and on-campus instruction you anticipate.

Online %

50

On-campus %

50

Lab Courses

How will the lab component of your course be differentiated from the lecture component of the course?

Lab activities are clearly labeled and compose a portion (category) of their overall grade.

From the COR list, what activities are specified as lab, and how will those be monitored by the instructor?

Lecture component in this class will have a content delivery and exercises that are graded as either correct or not. On the other hand the Lab component will have a research and observation component that students will have to maintain.

How will you assess the online delivery of lab activities?

There is no right or wrong, the end results could be countless and the student will be evaluated in their interpretation of the results. Student will have to use critical thinking to submit reports and feed their observations in the final project presentation.

Instructional Materials and Resources

If you use any other technologies in addition to the college LMS, what other technologies will you use and how are you ensuring student data security?

We will use McGrawHill activities in this course, in addition to the LMS. This platform is hosted by the publishers and is integrated into the LMS through an LTI.

If used, explain how specific materials and resources outside the LMS will be used to enhance student learning.

This platform is a necessity to our instruction. The activities are directly related to our course content and are impossible to recreate on our own.

Effective Student/Faculty Contact

Which of the following methods of regular, timely, and effective student/faculty contact will be used in this course?

Within Course Management System:

Discussion forums with substantive instructor participation
Online quizzes and examinations
Regular virtual office hours
Timely feedback and return of student work as specified in the syllabus
Video or audio feedback
Weekly announcements

External to Course Management System:

Direct e-mail
E-portfolios/blogs/wikis
Posted audio/video (including YouTube, 3cm mediasolutions, etc.)
Teleconferencing
Telephone contact/voicemail

Briefly discuss how the selected strategies above will be used to maintain Regular Effective Contact in the course.

We will ensure that our instructors provide individualized feedback to all participating students through any one of the listed strategies.

Other Information

MIS Course Data

CIP Code

52.0803 - Banking and Financial Support Services.

TOP Code

050400 - Banking and Finance

SAM Code

D - Possibly Occupational

Basic Skills Status

Not Basic Skills

Prior College Level

Not applicable

Cooperative Work Experience

Not a Coop Course

Course Classification Status

Credit Course

Approved Special Class

Not special class

Noncredit Category

Not Applicable, Credit Course

Program Status

Program Applicable

Transfer Status

Transferable to CSU only

Allow Audit

No

Repeatability

No

Materials Fee

No

Additional Fees?

No

Approvals**Curriculum Committee Approval Date**

10/20/2022

Academic Senate Approval Date

10/27/2022

Board of Trustees Approval Date

12/16/2022

Chancellor's Office Approval Date

12/18/2022

Course Control Number

CCC000635042

Programs referencing this course

Accounting Certificate of Achievement (<http://catalog.collegeofthedesert.eduundefined/?key=114>)

Liberal Arts: Business and Technology AA Degree (<http://catalog.collegeofthedesert.eduundefined/?key=27>)

Accounting AS Degree (<http://catalog.collegeofthedesert.eduundefined/?key=58>)