BUSI 61: INVESTMENT FUNDamentals

Foothill College Course Outline of Record

<table>
<thead>
<tr>
<th>Heading</th>
<th>Value</th>
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<tbody>
<tr>
<td>Units:</td>
<td>3</td>
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<tr>
<td>Hours:</td>
<td>3 lecture per week (36 total per quarter)</td>
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<tr>
<td>Degree &amp; Credit Status:</td>
<td>Degree-Applicable Credit Course</td>
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<tr>
<td>Foothill GE:</td>
<td>Non-GE</td>
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<tr>
<td>Transferable:</td>
<td>CSU</td>
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<tr>
<td>Grade Type:</td>
<td>Letter Grade (Request for Pass/No Pass)</td>
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<tr>
<td>Repeatability:</td>
<td>Not Repeatable</td>
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Student Learning Outcomes
- Students will demonstrate an understanding and appropriate use of financial business terms and concepts in the term project.
- Students will critically analyze, evaluate and interpret financial business information for their term projects.
- Students will demonstrate financial business concepts and strategies in their term projects and presentations.

Description

Course Objectives
The student will be able to:
A. Assess the relative investment merits of common stocks, preferreds, corporate bonds, treasury and government agency bonds and notes, municipal bonds, investment trusts, convertibles, listed, unlisted securities, real estate investing trusts.
B. Explain the functions and operation of the stock exchanges, brokerage office facilities and services; the analysis of securities values from a fundamental value standpoint, relative market valuation, personal finance, and from the technical standpoint of individual issues and overall market measures.
C. Describe many of the pitfalls of different investments and how to mitigate risk.
D. Analyze current taxation policies as they relate to financial planning.

Course Content
A. Introduction and class orientation
   1. Discussion of paper trading
   2. Discussion of market history
   3. Discussion of reasons for investment
   4. Discussion of current economic outlook
   5. Directions as to reading and study material
B. Discussion of investments
   1. Characteristics
   2. Rights
   3. Use in a portfolio
C. Investment management, including:
   1. Personal financial planning
   2. Choice of personal objectives
   3. Security characteristics
D. The stock exchanges
   1. Types of orders and how handled
   2. Margin accounts
   3. Short selling and commissions
E. The various exchanges and market
   1. Mutual funds
   2. ETFs
   3. Investing
F. Financial advising
   1. How to choose a competent financial advisor
   2. The pros and cons of free advice
   3. questions to be asked
   4. Conflicts of interest
G. Investment data sources, including:
   1. Online
   2. Periodicals
   3. Texts
   4. Newsletters
   5. Other sources
   6. Historical records
H. Current investment methods and factors
   1. Diversification concepts
   2. Capital Asset Pricing Model
   3. Option strategies to mitigate risks
   4. Option valuations
I. Review of course and evaluation, including:
   1. Discussion of student’s projects, including:
      a. Investing simulation
      b. Personal Financial Management spreadsheet
   2. Financial case studies
   3. Business news updates

Lab Content
Not applicable.

Special Facilities and/or Equipment
A. When taught via Foothill Global Access, on-going access to computer and email software and hardware; email address.

Method(s) of Evaluation
Methods of Evaluation may include but are not limited to the following:
A. Quizzes
B. Examinations
C. Appraisal analysis project (case studies, Personal Financial Plan)
D. Class discussion (business news updates and MyPortfolio simulation) and participation

Method(s) of Instruction
Methods of Instruction may include but are not limited to the following:
A. Lecture
B. Discussion
C. Cooperative learning exercises
D. Oral presentations
E. Electronic discussions/chat
F. Demonstration
G. Cases
H. Investment simulations

Representative Text(s) and Other Materials

Types and/or Examples of Required Reading, Writing, and Outside of Class Assignments
A. Reading from textbook

B. Current business news evaluations

C. Case studies

D. Student research on companies’ business performance

Discipline(s)
Business