

BUSAD134 : Investments

General Information

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Attachments:	DE Addendum_BUSAD_134_COR_09_01_2020 CoDE_09_26_2023.pdf
Course Code (CB01) :	BUSAD134
Course Title (CB02) :	Investments
Department:	BUSAD
Proposal Start:	Fall 2024
TOP Code (CB03) :	(0504.00) Banking and Finance
CIP Code:	(52.0803) Banking and Financial Support Services.
SAM Code (CB09) :	Possibly Occupational
Distance Education Approved:	No
Will this course be taught asynchronously?:	No
Course Control Number (CB00) :	CCC000326414
Curriculum Committee Approval Date:	02/28/2024
Board of Trustees Approval Date:	04/16/2024
Last Cyclical Review Date:	02/28/2024
Course Description and Course Note:	BUSAD 134 is designed to develop the student's understanding of the various public investments available, their potential risks and rewards, and the situations in which they are best utilized. Topics include investment principles and objectives, the operation of securities markets, investment banking, and asset selection and allocation.
Justification:	Mandatory Revision
Academic Career:	<ul style="list-style-type: none">Credit

Academic Senate Discipline

Primary Discipline:	<ul style="list-style-type: none">Business
Alternate Discipline:	No value
Alternate Discipline:	No value

Course Development

Basic Skill Status (CB08)

Course is not a basic skills course.

Allow Students to Gain Credit by Exam/Challenge

Course Special Class Status (CB13)

Course is not a special class.

Pre-Collegiate Level (CB21)

Not applicable.

Grading Basis

- Grade with Pass / No-Pass Option

Course Support Course Status (CB26)

Course is not a support course

Transferability & Gen. Ed. Options

General Education Status (CB25)

Not Applicable

Transferability

Transferable to both UC and CSU

Transferability Status

Approved

Units and Hours

Summary

Minimum Credit Units (CB07) 3

Maximum Credit Units (CB06) 3

Total Course In-Class (Contact) Hours 54

Total Course Out-of-Class Hours 108

Total Student Learning Hours 162

Credit / Non-Credit Options

Course Type (CB04)

Credit - Degree Applicable

Noncredit Course Category (CB22)

Credit Course.

Noncredit Special Characteristics

No Value

Course Classification Code (CB11)

Credit Course.

Variable Credit Course

Funding Agency Category (CB23)

Not Applicable.

Cooperative Work Experience

Education Status (CB10)

Weekly Student Hours

	In Class	Out of Class
Lecture Hours	3	6
Laboratory Hours	0	0
Studio Hours	0	0

Course Student Hours

Course Duration (Weeks)	18
Hours per unit divisor	0
Course In-Class (Contact) Hours	
Lecture	54
Laboratory	0
Studio	0

Total 54

Course Out-of-Class Hours

Lecture 108

Laboratory 0

Studio 0

Total 108

Time Commitment Notes for Students

No value

Units and Hours - Weekly Specialty Hours

Activity Name	Type	In Class	Out of Class
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No Value	No Value	No Value	No Value
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Pre-requisites, Co-requisites, Anti-requisites and Advisories

No Value

Entry Standards

Entry Standards

Course Limitations

Cross Listed or Equivalent Course

Specifications

Methods of Instruction

Methods of Instruction Demonstrations

Methods of Instruction Discussion

Methods of Instruction

Lecture

Out of Class Assignments

- Special project (e.g. Investment Portfolio for Client, Retirement Planning Project, Mutual Fund Research, Stock Portfolio Simulation)
- Chapter quizzes
- Reading assignments

Methods of Evaluation**Rationale**

Exam/Quiz/Test

Chapter Quizzes

Exam/Quiz/Test

Midterm Examination

Exam/Quiz/Test

Comprehensive Final Examination

Textbook Rationale

No Value

Textbooks**Author****Title****Publisher****Date****ISBN**

Brandford Jordan

Fundamentals of Investments,
9th edition

McGraw Hill

2021

9781260013979

Other Instructional Materials (i.e. OER, handouts)

No Value

Materials Fee

No value

Learning Outcomes and Objectives

Course Objectives

Analyze and compare stock, bond, option, and convertible investment strategies.

Use quantitative tools and computer simulations to select appropriate investment vehicles.

Compare and contrast the risks and rewards of different asset allocation portfolios.

SLOs

Evaluate an investor's ability to bear risk and determine an appropriate investment portfolio.

Expected Outcome Performance: 70.0

<i>ILOs</i> Core ILOs	Analyze and solve problems using critical, logical, and creative thinking; ask questions, pursue a line of inquiry, and derive conclusions; cultivate creativity that leads to innovative ideas.
	Demonstrate depth of knowledge in a course, discipline, or vocation by applying practical knowledge, skills, abilities, theories, or methodologies to solve unique problems.
<i>BUSAD</i> General Business - A.S. Degree Major	Analyze, evaluate, and explain business problems using basic concepts and terminology of accounting and finance.
<i>BUSAD</i> General Business - Certificate	Analyze, evaluate, and explain business problems using basic concepts and terminology of accounting and finance.
<i>BUSAD</i> Financial Planning and Investment	Understand the terminology of finance and express themselves analytically using time value of money concepts, liquidity analysis, profitability analysis, and equity management concepts.

Analyze financial statements of companies and determine their financial strengths and weaknesses.

Expected Outcome Performance: 70.0

<i>ILOs</i> Core ILOs	Analyze and solve problems using critical, logical, and creative thinking; ask questions, pursue a line of inquiry, and derive conclusions; cultivate creativity that leads to innovative ideas.
	Demonstrate depth of knowledge in a course, discipline, or vocation by applying practical knowledge, skills, abilities, theories, or methodologies to solve unique problems.
<i>BUSAD</i> General Business - A.S. Degree Major	Analyze, evaluate, and explain business problems using basic concepts and terminology of accounting and finance. Understand and apply the four P's of marketing, business law, investments, management, and marketing.
<i>BUSAD</i> General Business - Certificate	Analyze, evaluate, and explain business problems using basic concepts and terminology of accounting and finance. Understand and apply the four P's of marketing, business law, investments, management, and marketing.
<i>BUSAD</i> Financial Planning and Investment	Understand the terminology of finance and express themselves analytically using time value of money concepts, liquidity analysis, profitability analysis, and equity management concepts.

Apply the tools of investing to determine the appropriateness of an investment.

Expected Outcome Performance: 70.0

<i>ILOs</i> Core ILOs	Analyze and solve problems using critical, logical, and creative thinking; ask questions, pursue a line of inquiry, and derive conclusions; cultivate creativity that leads to innovative ideas.
	Demonstrate depth of knowledge in a course, discipline, or vocation by applying practical knowledge, skills, abilities, theories, or methodologies to solve unique problems.

BUSAD
General Business - A.S.
Degree Major

Analyze, evaluate, and explain business problems using basic concepts and terminology of accounting and finance.

Understand and apply the four P's of marketing, business law, investments, management, and marketing.

BUSAD
General Business -
Certificate

Analyze, evaluate, and explain business problems using basic concepts and terminology of accounting and finance.

Understand and apply the four P's of marketing, business law, investments, management, and marketing.

BUSAD
Financial Planning and
Investment

Understand the terminology of finance and express themselves analytically using time value of money concepts, liquidity analysis, profitability analysis, and equity management concepts.

Additional SLO Information

Does this proposal include revisions that might improve student attainment of course learning outcomes?

No

Is this proposal submitted in response to learning outcomes assessment data?

No

If yes was selected in either of the above questions for learning outcomes, explain and attach evidence of discussions about learning outcomes.

No Value

SLO Evidence

No Value

Course Content

Lecture Content

Investment Environment and Market (3 hours)

- Economic Factors
- Market Conditions
- Investment Trends
- Regulatory Environment
- Global Market Influences

Fixed Income Securities (4 hours)

- Types of Bonds
- Bond Valuation
- Yield Curves
- Credit Ratings
- Bond Market Dynamics

Common Stock (4 hours)

- Stock Valuation
- Dividends and Earnings
- Equity Analysis
- Market Trends
- Stock Market Strategies

Options (5 hours)

- Call and Put Options
- Option Pricing
- Options Trading Strategies
- Risk and Return in Options
- Hedging with Options

Investment Trusts (3 hours)

- Types of Investment Trusts
- Structure and Operation

- Trust Performance Evaluation
- Risks and Rewards
- Investment Trust Regulations

Economic Environment and Investment Strategies (6 hours)

- Economic Indicators
- Monetary Policy
- Fiscal Policy
- Inflation and Deflation
- Investment Strategies in Different Economic Environments

Portfolio and Risk Management (6 hours)

- Risk Assessment
- Risk Mitigation Strategies
- Portfolio Construction
- Risk-Adjusted Returns
- Portfolio Optimization
- Risk Management Tools and Techniques
- Behavioral Aspects in Risk Management

Investment Analysis (10 hours)

- Attitudes and behaviors
- Client profiles
- Portfolio suitability
- Investment vehicle characteristics

Individual Investment Vehicles (3 hours)

- Stocks
- Bonds
- Mutual Funds
- Exchange-Traded Funds (ETFs)
- Real Estate Investment Trusts (REITs)

Asset Selection and Allocation (3 hours)

- Asset Classes
- Risk Tolerance and Investment Objectives
- Diversification
- Strategic Asset Allocation
- Tactical Asset Allocation

Portfolio Review and Monitoring (4 hours)

- Performance Metrics
- Portfolio Evaluation
- Rebalancing Strategies
- Monitoring Economic and Market Trends
- Adjusting Investment Strategies

Other Investments (3 hours)

- Life insurance
- Real Estate

Total Hours: 54

Additional Information

Is this course proposed for GCC Major or General Education Graduation requirement? If yes, indicate which requirement in the two areas provided below.

No

GCC Major Requirements

No Value

GCC General Education Graduation Requirements

No Value

Repeatability

Not Repeatable

Justification (if repeatable was chosen above)

No Value

Resources

Did you contact your departmental library liaison?

No

If yes, who is your departmental library liaison?

Aisha Conner-Gaten (Business, ESL-Credit)

Did you contact the DEIA liaison?

No

Were there any DEIA changes made to this outline?

No

If yes, in what areas were these changes made:

No Value

Will any additional resources be needed for this course? (Click all that apply)

No Value

If additional resources are needed, add a brief description and cost in the box provided.

No Value