



**DEPARTMENT OF BUSINESS AND OFFICE ADMINISTRATION**

**COURSE OUTLINE – FALL 2015**

**BA 2730 3(3-0-0) 45 Hours: Personal Investing**

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**OFFICE**

**HOURS:** Mon. 8:30 – 9:30, Tues. & Thurs. 10:00 – 11:00

**PREREQUISITE(S)/COREQUISITE:** BA 1050 or consent of instructor

**REQUIRED TEXT/RESOURCE MATERIALS:** Investments: Analysis and Management. W. Sean Cleary, Charles P. Jones. Third Canadian Edition. Wiley.

**All students must have access to WileyPLUS.** You must have an access code in order to gain access to the online resources. WileyPLUS is a web-based assignment and assessment platform that gives students the means to better connect with their coursework, and with the important concepts that they will need to know for success now and in the future. If you have purchased a used book, you will have to purchase an access code separately. Instructions to do this are available in the Welcome Module.

**CALENDAR DESCRIPTION:** This course offers an overview of the customers and products involved in the financial marketplace. It introduces the student to client objectives and types. Securities, financial markets, and investment portfolios are also examined. A review of mutual funds is undertaken focusing on the different types of funds, their fees and services, and how to select a fund.

**CREDIT/CONTACT HOURS:** BA 2730 is a 3 credit course consisting of 45 hours of instruction

**DELIVERY MODE(S):** BA 2730 consists of three hours of lecture per week.

**OBJECTIVES:** The objective of this course is to help you understand the investments field as it is currently understood, discussed, and practiced so that you can make sound investment decisions that will enhance your economic welfare. Key concepts are presented to provide an appreciation of the theory and practice of investments.

**OUTCOMES:**

- The student will be able to define investment and discuss what it means to study investments
- The student will be able to explain why risk and return are the two critical components of all investing decisions.
- The student will be able to explain the key factors that affect the investment decision process.
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- The student will be able to state the major types of mutual funds and give their features.
- The student will be able to compare how the performance of investment funds is measured.
- The student will be able to explain how expected return and risk for securities are determined.
- The student will be able to explain how expected return and risk for portfolios are determined.
- The student will be able to apply the Markowitz efficient portfolio selection model.
- The student will be able to describe the effect of risk-free borrowing and lending on the efficient frontier.
- The student will be able to separate total risk into systematic and non-systematic risk.
- The student will be able to explain capital market theory and the capital asset pricing model.
- The student will be able to describe two important relationships in the CAPM as represented by the capital market line and the security market line.
- The student will be able to calculate the price of a bond.
- The student will be able to explain the bond valuation process.
- The student will be able to calculate major bond yield measures, including yield to maturity, yield to call and horizon return.

## **TRANSFERABILITY:**

**\*\* Grade of D or D+ may not be acceptable for transfer to other post-secondary institutions. Students are cautioned that it is their responsibility to contact the receiving institutions to ensure transferability.**

Block transfer post-diploma agreements have been made with the following institutions: Athabasca University (including the GPRC on-campus AU 2+1 and 2+2 Bachelor of Management degree), University of Lethbridge, Lakeland College, Okanagan College, Thompson Rivers' University, and Royal Roads University. Students intending to transfer to a post-secondary institution to take advantage of a transfer opportunity are advised to check with the appropriate college/institute for the latest transfer information as acceptance of transfer is at the discretion of the receiving college.

### **GRADING CRITERIA:**

Assignments (best 4/5 @ 5% each)	20%
Quizzes (best 4/5 @ 5% each)	20%
Mid Term	25%
Final Exam	<u>35%</u>
	100%

**GRANDE PRAIRIE REGIONAL COLLEGE****GRADING CONVERSION CHART**

<b>Alpha Grade</b>	<b>4-point Equivalent</b>	<b>Percentage Guidelines</b>	<b>Designation</b>
<b>A<sup>+</sup></b>	<b>4.0</b>	<b>90 – 100</b>	<b>EXCELLENT</b>
<b>A</b>	<b>4.0</b>	<b>85 – 89.99</b>	
<b>A<sup>-</sup></b>	<b>3.7</b>	<b>80 – 84.99</b>	<b>FIRST CLASS STANDING</b>
<b>B<sup>+</sup></b>	<b>3.3</b>	<b>77 – 79.99</b>	
<b>B</b>	<b>3.0</b>	<b>73 – 76.99</b>	<b>GOOD</b>
<b>B<sup>-</sup></b>	<b>2.7</b>	<b>70 – 72.99</b>	
<b>C<sup>+</sup></b>	<b>2.3</b>	<b>67 – 69.99</b>	<b>SATISFACTORY</b>
<b>C</b>	<b>2.0</b>	<b>63 – 66.99</b>	
<b>C<sup>-</sup></b>	<b>1.7</b>	<b>60 – 62.99</b>	
<b>D<sup>+</sup></b>	<b>1.3</b>	<b>55 – 59.99</b>	<b>MINIMAL PASS</b>
<b>D</b>	<b>1.0</b>	<b>50 – 54.99</b>	
<b>F</b>	<b>0.0</b>	<b>0 – 49.99</b>	<b>FAIL</b>
<b>WF</b>	<b>0.0</b>	<b>0</b>	<b>FAIL, withdrawal after the deadline</b>

## **EXAMINATIONS:**

The midterm will be written approximately at the end of week 7.

The final examination will be scheduled during the exam week by the registrar's office.

## **Student Conduct**

As a student, it is your responsibility to read, understand and comply with the college's academic policies, which are reviewed regularly, updated and posted on our college website. If you have any questions regarding these policies, please contact Student Services.

## **Assignment, Quizzes and Exam Policies:**

- Assignments, quizzes and exams will be written as scheduled. No rewrites will be given. If there is an excusable absence, the weighting of the missed exam will be added to the final exam weighting. If the absence is not excusable, a grade of 0% will be given.
- Any exam or assignment mark that a student may wish to contest must be done so within 5 business days after the exam/assignment has been marked. Any exams/assignments contested after this time frame will not be given consideration.
- In order to get the most out of class regular attendance and active participation is encouraged. Repeated lateness will be viewed similar to an absence in class. Disruptive behavior will also be viewed as "not professional" and the student will be asked to leave the classroom, resulting in a marked absence....i.e. excessive/disruptive talking, texting, taking phone calls, ect.
- Students are expected to demonstrate professional conduct for the duration of the course. Some aspects of this include the following: attending each class and arriving on time, restricting discussions in class to the current course material, keeping mobile phones in the "off" or "silent" modes, and not placing or answering calls, text messages, or emails during class time. Unprofessional conduct is disruptive to the learning environment and makes mastering the course material more difficult for all students. If behavior is deemed to be disruptive to the classroom environment, the student will be required to leave.

## STUDENT RESPONSIBILITIES:

### Academic Regulations

#### Debarred From Exams

“You may be **refused permission to write a final examination** in a course on the advice of the instructor concerned. This usually happens when absences are excessive or if significant parts of required assignments or lab work are not completed.” The definition of excessive absences in this class will be more than 5 absences.

- **It is the student’s responsibility to arrive on time and remain for the duration of scheduled classes and related activities.**
- **It is the student’s responsibility to respect the instructor’s right to enforce the attendance requirements for the course.**
- **It is the student’s responsibility to respect the instructor’s right to determine the course content, instructional methodology, evaluation procedures and the frequency of evaluation within the guidelines set for the course and approved by the department.**
- **It is the student’s responsibility to respect the instructor’s right to set deadlines for assigned work, to expect assignments to be submitted at the times specified, and to establish penalties for failure to comply with deadlines.**
- **It is the student’s responsibility to respect the instructor’s right to expect assignments to be neatly presented (typed or, if hand-written, double spaced) with appropriate identification (name, student number, course title).**
- **It is the student’s responsibility to respect the instructor’s right to expect that any work submitted by a student is his/her own. It is the student’s obligation to know what plagiarism and other forms of cheating are, and to know the consequences.**
- **It is the student’s responsibility to write tests and final examinations at the times scheduled by the instructor or the Office of the Registrar.**
- **It is the student’s responsibility to complete course work and assignments missed when absent. Participation in optional activities such as athletic events or student exchanges, etc. does not reduce the student’s academic responsibility.**

- **It is the student's responsibility to familiarize him/herself with the procedures to be followed when writing College examinations.**
- **It is the student's responsibility to respect the instructor's right to appropriate classroom deportment by all students. Should a student be disruptive and/or disrespectful, the instructor has the right to take action to exclude the disruptive student from learning**

## **STATEMENT ON PLAGIARISM AND CHEATING:**

Please refer to the College calendar regarding plagiarism, cheating and the resultant penalties. These are serious issues and will be dealt with severely.



## COURSE SCHEDULE/TENTATIVE TIMELINE:

Dates	Chapter Covered	Assignments	Quizzes	Exams
Sept. 2 <sup>nd</sup> – 4 <sup>th</sup>	Ch. 1	*See <b>Wiley Plus</b> for Assignment Due Dates	*See <b>Wiley Plus</b> for Quiz Due Dates	
Sept. 7 <sup>th</sup> – 11 <sup>th</sup>	Ch. 2 Ch. 3		Quiz #1 Ch. 1, 2, 3	
Sept. 14 <sup>th</sup> – 18 <sup>th</sup>	Ch. 4 Ch. 5			
Sept. 21 <sup>st</sup> – 24 <sup>th</sup>	Ch. 5	Assignment #1 Ch. 5	Quiz #2 Ch. 4, 5	
Sept. 28 <sup>th</sup> – Oct. 2 <sup>nd</sup>	Ch. 6			
Oct. 5 <sup>th</sup> – 9 <sup>th</sup>	Ch. 6	Assignment #2 Ch. 6		
Oct. 12 <sup>th</sup> – 16 <sup>th</sup>	Ch. 7			
Oct. 19 <sup>th</sup> – 23 <sup>rd</sup>	Ch. 7	Assignment #3 Ch. 7	Quiz #3 Ch. 6, 7	Mid-Term Ch. 1-7
Oct. 26 <sup>th</sup> – 30 <sup>th</sup>	Ch. 8			
Nov. 2 <sup>nd</sup> – 6 <sup>th</sup>	Ch. 9			
Nov. 9 <sup>th</sup> – 10 <sup>th</sup> <b>FALL BREAK Nov. 11-13</b>	Ch. 9	Assignment #4 Ch. 9		
Nov. 16 <sup>th</sup> – 20 <sup>th</sup>	Ch. 10		Quiz #4 Ch. 8, 9, 10	
Nov. 23 <sup>rd</sup> – 27 <sup>th</sup>	Ch. 11			
Nov. 30 <sup>th</sup> – Dec. 4 <sup>th</sup>	Ch. 11 Ch. 12	Assignment #5 Ch. 11		
Dec. 7 <sup>th</sup> – 8 <sup>th</sup>	Ch. 12		Quiz #5 Ch. 11, 12	
Dec. 10 <sup>th</sup> – 18 <sup>th</sup>				<b>Final Exam (35%)</b>