

GRANDE PRAIRIE REGIONAL COLLEGE
BUSINESS ADMINISTRATION
COURSE OUTLINE

1987-88

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BA 204 - INVESTMENTS

REQUIRED
TEXT:

Mayo, Herbert B. Investments. 2nd ed., New York, NY: Holt, Rinehart, Winston, 1988.

Cote, Jean-Marc and Donald Day. Personal Financial Planning in Canada. Toronto, Ont.: Allyn & Bacon, 1987.

OPTIONAL
TEXT:

How to Invest in Canadian Securities, The Canadian Securities Institute, Toronto, Ont., 1986.
(For those wishing a more in-depth treatment of some topics.)

PREREQUISITE: Nil

COURSE
DESCRIPTION:

An introduction to investments for individuals. Some of the topics to be covered include: the economic environment and how it affects investments, taxation of investments, tax shelters, mathematics of investments, and an introduction to the more common investment vehicles.

COURSE
OBJECTIVES:

- . To introduce the fundamentals of financial planning and investing.
- . To introduce some of the tools needed to design and implement a financial plan and an investment program.
- . To reduce the mysteries of the investment markets by devoting a portion of each class to a discussion of current investment news.
- . To give the course a practical side by playing an investment game.

GRADING:

Students will choose from one of the following grading schemes.

1)	Paper #1	20%	2)	Paper #1	20%
	Game	10%		Paper #2	20%
	Mid-term Exam	25%		Game	10%
	Final Exam	45%		Mid-term Exam	20%
				Final Exam	30%

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Paper #1 will be based on the financial statement analyses chapters in the text and supplementary readings. The student will choose a company from a selection of financial statements offered by the instructor, examine its investment potential and make a recommendation on it. The deadline for this paper will be November 9, 1987 at 5 p.m.

Paper #2 will be on a topic of the student's choice and may include an analysis of a specific commodity such as wheat, gold, platinum or currency, impact of deregulation in Canada, the relative merits/demerits of technical trading, the analysis of some economic policy on the investment markets, etc. All topics are to be approved by the instructor and a topical outline is due no later than October 30. The deadline for this paper will be December 1, 1987 at the end of the class.

Both papers should be limited to no more than 10 pages exclusive of appendices and references. No late papers will be accepted.

DETAILED COURSE CONTENT:

DATE	TOPIC	COTE, DAY	READINGS
			MAYO
Sept. 8	Intro. to Course Intro. to Financial Planning	Chapter 1 - 5	Chapter 13 pp 270 - 281
Sept. 15	Math of Invest.	Chapter 6	Chapter 6
Sept. 22	Tax Aspects of Investing/RRSP, RESP, Tax Shelters	Chapter 7, 11 handouts	
Sept. 29	Intro. to Investments/ Economic Environment	Chapter 12	Chapter 1, 2, 3 Chapter 16
Oct. 6	Fixed Income Securities/ Preferred Stock	Chapter 8	Chapter 9, 10 Chapter 11

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COURSE CONTENT (continued)
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Date	Topic	Cote, Day	Mayo
Oct. 13	Stocks		Chapter 13, p 281 - 295 Chapter 14, 15
Oct. 20	Stocks		Chapter 7, 17
Oct. 27	Mutual Funds	Handouts	Chapter 22
Nov. 3	Options/Warrants		Chapter 19, 20
Nov. 10	Commodity Futures/ other leveraging techniques		Chapter 23
Nov. 17	Gold & Foreign Securities		Chapter 24, 26
Nov. 24	Technical Analysis		Chapter 18
Dec. 1	Retirement Planning Portfolio Construction	Chapter 13	Chapter 26

RESOURCE BOOKS FOR BA 204

1. Common Stocks: A Plan for Intelligent Investing; Shade
2. Introduction to Investments; Christy and Clendenin
3. Investment Strategy; Coates
4. The Three Rs of Investing; Donnelly
5. How to Invest for Bigger Profits; Goldring
6. A Random Walk Down Wall Street; Malkiel
7. How to Invest Your Money and Profit from Inflation; Shulman
8. Making Your Money Grow; Worzel
9. A Women's Guide to Successful Investing; Williams
10. Inflation Proofing Your Investments; Brown/Coxon
11. Investment Manager's Handbook; Levine
12. Market Smarts; Klinger
13. The Coming Currency Collapse; Smith
14. The Financial Post Survey of Funds, 1973
15. The Financial Post Survey of Funds, 1974
16. The Financial Post Survey of Funds, 1975
17. The Financial Post Survey of Funds, 1976
18. The Financial Post Survey of Funds, 1977
19. How to Buy Mutual Funds
20. Stock Market Efficiency; Keane
21. The Last Bull Market; Sobel
22. An Introduction to Risk and Return from Common Stocks; Brealey
23. Investment Analysis and Management; Bowyer
24. The Money Game; Smith
25. The Money Mania; Sobel
26. The Financial Post Survey of Industries 1971-1986(inclusive)
27. The Traders; Ross
28. Capital Formation in Canada 1896-1930
29. The Impact of Investment Incentives on Canada's Economic Growth; Braithwaite
30. The Theory of Futures Trading; Goss
31. Dynamic Call Options Models; Rosalski
32. Inside the Bank of Canada's Weekly Financial Statistics; Martin
33. How to Read Annual Reports Intelligently, Prentice Hall
34. Standard & Poor's Register, 1986
35. Federal Reserve Bank of St. Louis Review, 1981 - present.
36. The Investor's Encyclopedia; Chet Currier
37. Canadian Financial Markets; Hunter
38. Wall Street Gurus; Brimelow
39. The Dow Jones-Irwin Business & Investment Almanac

NEWSPAPERS IN LIBRARY

1. Financial Post
2. Financial Times
3. Globe and Mail
4. Edmonton Journal
5. Wall Street Journal
6. Barrons
7. New York Times