



DEPARTMENT OF Business
COURSE OUTLINE – WINTER 2014
BA 2730: Investment Funds

INSTRUCTOR: Gwen Hoyseth **PHONE:** 780-539-2066
OFFICE: C212 **E-MAIL:** ghoyseth@gprc.ab.ca

OFFICE

HOURS: Tues. & Thurs. 11:30 – 1:00 or by appointment

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

REQUIRED TEXT/RESOURCE MATERIALS: Fundamentals of Investments: Valuation and Management. Jordan, Miller, Yuce. Third Canadian Edition. McGraw-Hill Ryerson

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:

- Be able to guide clients in their selection of mutual funds and related investment products.
- Be able to confidently describe and discuss with clients the risk/return characteristics of the different fund types.
- Be able to ensure product suitability
- Be able to provide superior customer service with respect to mutual fund investments

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:

Stock Market Game	25%
Mid Term	25%
Quizzes	15%
Final Exam	35%

Grades will be assigned on the Letter Grading System.

Business Administration and Commerce Department

Grading Conversion Chart

Alpha Grade	4-point Equivalent	Percentage Guidelines	Designation
A ⁺	4	94 – 100	EXCELLENT
A	4	90 – 93	
A ⁻	3.7	85 – 89	FIRST CLASS STANDING
B ⁺	3.3	80 – 84	
B	3	76 – 79	GOOD
B ⁻	2.7	72 – 75	
C ⁺	2.3	68 – 71	SATISFACTORY
C	2	64 – 67	
C ⁻	1.7	60 – 63	
D ⁺	1.3	55 – 59	MINIMAL PASS
D	1	50 – 54	
F	0	0 – 49	FAIL

EXAMINATIONS:

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

The final examination will be scheduled by the registrar's office.
during the exam period April 16th to April 28th

The stock market game will be due March ?. Materials for the stock market game will be discussed and dispersed in class. Any late assignments will be deducted 10% per day.

*** All quizzes, mid-terms and finals will be written as scheduled.**

***No rewrites will be given on missed quizzes or midterms. If there is an excusable absence the weighting of the missed quiz/exam will be added to the final exam weighting.**

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:

Week	Topic
1	Ch. 1
2	Ch. 2
3	Ch. 2
4	Ch. 3
5	Ch. 4
6	Ch. 5
7	Ch. 6
8	Ch. 7
9	Ch. 8
10	Ch. 14
11	Ch. 19
12	Ch. 20
13	Review