

New Graduate Course Proposal

Form Procedure

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Course Title

Course Title:

Proposed Banner Abbreviation:

Banner limit of 30 characters, including punctuation, spaces, and special characters.

Department/Committee Information

The main contact person for the Graduate Curriculum Committee should fill out this form.

Requestor Name:

Members of the Graduate Curriculum Committee:

Beverley Hollingsworth
 Brian Webb
 Denise Simion
 Michael Greenwood
 Marie Hunte
 Marian Simion
 Patrick Malone
 Glenn King, Jr.
 Renee Scapparone

Department / Unit Developing:

Chair of Department for Program: Chair Email:

Academic Dean of Department or Program: Academic Dean E-mail:

Program Chair The Program Chair for this request is among the people listed above.
 * Yes
 No

Course Information

Course Description

Essentials of Investments continues to evolve along with the changes in the financial markets yet remains organized around one basic theme?that security markets are nearly efficient, meaning that you should expect to find few obvious bargains in these markets. This course places great emphasis on asset allocation while presenting the practical applications of investment theory. It also focuses on investment analysis, which allows us to present the practical applications of investment theory and convey practical value insights.

Rationale and expected outcomes of offering the Course

1. Analyze an investment using a variety of techniques.
2. Analyze the impact of taxes upon the investment decision.
3. Explain the Capital Asset Pricing Model and the Arbitrage Pricing Theory.
4. Identify the various types of securities available in the market.
5. Describe the current investment environment (domestic and international)
6. Obtain and interpret investment information from various sources (both traditional and electronic)
7. Analyze the various investment vehicles such as:
 - a) Common stock,
 - b) Fixed income securities (e.g., bonds and preferred stock),
 - c) Derivative securities (e.g., options and futures contracts), and
 - d) Mutual funds.
8. Relate financial theories of valuation (risk and return), portfolio management and efficient markets to current market

conditions

Number of Credits: 03

Discipline Prefix or Prefixes:

MGMT

Brief rationale if more than one prefix:

This is a management course.

Level of Course:

- 7000
- 8000
- 9000

Brief rationale for level choice::

This is a graduate level course.

The course will be:

- Requirement
- Elective

Elective or Requirement Note/Special:

Is there a similar undergraduate course?

- Yes
- No

Does this course affect offerings in any other department or program?

- Yes
- No

Course Enollment

Expected Average Enrollment:

45

This course is a replacement for:

Course # / Name

Has the course been offered previously as a "Topics" course?

- Yes
- No

Is this an Extended Campus Course?

- Yes
- No

Which semester will this course be offered for the first time?:

Fall 2022

How often thereafter to be offered?:

Every other term.

Course Requirements

Prerequisite course(s) if any:

N/A

Additional Requirements

Laboratory Hours: N/A

Fieldwork Hours: N/A

Pre-Practicum Hours: N/A

Practicum Hours: N/A

Other Requirements (specify):

N/A

Syllabus Upload

New Course Syllabus Upload:

Investment Management- Annotated Syllabus.pdf

Signatures

Click on the Submit Form button at the bottom of the page after you have signed the form. You should receive an email confirmation that your signature has been completed.

...3530353239

Brian Webb

12/06/2021

Requester Signature

Date

...3534333837

Renee Scapparone

12/09/2021

Department Chair Approval

Date

...3633303135

Nancy Murray

12/10/2021

Academic Dean Signature

Date

...3031343234

Becky Copper Illenz

12/10/2021

SGOCE Dean Signature

Date

Approval of the Graduate Council

Date

Approval of the President

Date

Notification

Reviewed by the Registrar:

Reviewed by the Library:

SGOCE Admin. Assistant
Signature

Electronically signed by Denise Bertrand on 12/09/2021 7:48:47 AM

COURSE NAME Investment Management

INSTRUCTOR Professor Brian Webb, CFA, FRM

COURSE DESCRIPTION Essentials of Investments continues to evolve along with the changes in the financial markets yet remains organized around one basic theme—that security markets are nearly efficient, meaning that you should expect to find few obvious bargains in these markets. This course places great emphasis on asset allocation while presenting the practical applications of investment theory. It also focuses on investment analysis, which allows us to present the practical applications of investment theory and convey practical value insights.

COURSE OBJECTIVES

1. Analyze an investment using a variety of techniques.
2. Analyze the impact of taxes upon the investment decision.
3. Explain the Capital Asset Pricing Model and the Arbitrage Pricing Theory.
4. Identify the various types of securities available in the market.
5. Describe the current investment environment (domestic and international)
6. Obtain and interpret investment information from various sources (both traditional and electronic)
7. Analyze the various investment vehicles such as:
 - a) Common stock,
 - b) Fixed income securities (e.g., bonds and preferred stock),
 - c) Derivative securities (e.g., options and futures contracts), and
 - d) Mutual funds.
8. Relate financial theories of valuation (risk and return), portfolio management and efficient markets to current market conditions

REQUIRED TEXT *Essentials of Investments*, 12th Edition. By Zvi Bodie and Alex Kane and Alan Marcus

TOPICAL OUTLINE	ESTIMATED CONTACT HOURS
ELEMENTS OF INVESTMENTS	
• Investments: Background and Issues	4

	<ul style="list-style-type: none"> • Asset Classes and Financial Instruments 	
	ELEMENTS OF INVESTMENTS	
II	<ul style="list-style-type: none"> • Securities Markets • Mutual Funds and Other Investment Companies 	6
	PORTFOLIO THEORY	
III	<ul style="list-style-type: none"> • Risk, Return, and the Historical Record • Efficient Diversification 	6
	PORTFOLIO THEORY	
IV	<ul style="list-style-type: none"> • Capital Asset Pricing and Arbitrage Pricing Theory • The Efficient Market Hypothesis • Behavioral Finance and Technical Analysis 	6
	DEBT SECURITIES	
V	<ul style="list-style-type: none"> • Bond Prices and Yields • Managing Bond Portfolios 	6
	SECURITY ANALYSIS	
VI	<ul style="list-style-type: none"> • Macroeconomic and Industry Analysis • Equity Valuation • Financial Statement Analysis 	6
	DERIVATIVE MARKETS	
VII	<ul style="list-style-type: none"> • Options Markets • Option Valuation • Futures Markets and Risk Management 	6
	Total Sessions Expressed as Contact Hours	40

RECAP

IDENTIFICATION OF CPC TOPICS COVERED IN THIS COURSE	ESTIMATED CONTACT HOURS
Accounting	5
Marketing	1
Finance	30
Management	
Management Principals	2
Organizational Behavior	2

Human Resource Management	2
Operations Management	2
Economic/Social/Legal Environment	
Legal Environment of Business	4
Economics	4
Business Ethics	4
Decision-Support Tools	
Information Systems	1
Quantitative Methods/Statistics	1
International/Global Dimensions of Business	1
Integrative Experience	1
Total (estimate of contact hours)	60