

Syllabus for INV-7110

INVESTMENTS

COURSE DESCRIPTION

The course will cover investment setting, asset allocation, global investments, functioning of securities markets, portfolio management, asset pricing model, and models of risk and return. It analyzes financial statements, company, industry, and macroeconomic valuation of stocks and bonds. It also examines derivative securities and contracts such as forward, futures, and options. It further provides a conceptual base for investment managers, individual investors, and corporate financial managers.

COURSE OBJECTIVES

After completing this course, you will be able to:

- CO1** Analyze investment environment, asset allocation, and investment decision in both domestic and the international markets.
- CO2** Assess the securities markets including the market indexes, their organization, and functioning.
- CO3** Evaluate various asset pricing models and efficient capital markets for investment decision making not only in individual securities but also for portfolio management analysis.
- CO4** Conduct a complete risk assessment using the arbitrage pricing theory and multifactor models and analyze financial statements for investment decision making purposes.
- CO5** Analyze the impact of macroeconomic and microeconomic variables on the securities markets and examine the value of different securities by applying various valuation models.
- CO6** Analyze investment decisions based on company and industry assessments including firm competitiveness and industry trends.
- CO7** Assess the derivative markets and their use for investing and hedging the risk of individual or portfolio securities.
- CO8** Evaluate various alternative assets and the role of professional money managers and financial advisory firms for investment decision making.

COURSE MATERIALS

You will need the following materials to complete your coursework. Some course materials may be free, open source, or available from other providers. You can access free or open-source materials by clicking the links provided below or in the module details documents. To purchase course materials, please visit the [University's textbook supplier](#).

Required Textbook

- Reilly, F., & Brown, K. (2012). *Investment analysis and portfolio management* (10th ed.). Mason, OH: South-Western/ Cengage Learning.
ISBN-13: 978-0538482387

COURSE STRUCTURE

Investments is a three-credit online course, consisting of **four** modules. Modules include an overview, topics, learning objectives, study materials, and assignments. Module titles are listed below.

- **Module 1: Introduction to Investment Environment and Operations of Securities Markets**
- **Module 2: Investment Theory Developments and Analysis of Financial Statements**
- **Module 3: Security Valuation, Analysis, and Management of Common Stocks**
- **Module 4: Analysis of Derivative Securities and Asset Management**

ASSESSMENT METHODS

For your formal work in the course, you are required to participate in **eight** graded discussion forums, **two** synchronous events, and to complete **four** written assignments. You are also required to complete a midterm project and a final project.

Consult the **Course Calendar** for assignment due dates.

Promoting Originality

One or more of your course activities may utilize a tool designed to promote original work and evaluate your submissions for plagiarism. More information about this tool is available in [this document](#).

Discussion Forums

This course requires you to participate in **eight** graded discussion forums. There are also two ungraded but required forums in Module 1. In addition, there are two discussion forums for synchronous events. [Online Discussion Grading Rubric](#).

Written Assignments

You are required to complete **four** written assignments. Each written assignment includes selected questions and problems from the end of chapters that may require you do some calculations and/or evaluate different options in making investment decisions.

Synchronous Events

You are required to participate in **two** synchronous events during Week 3 and 6 of the semester in Edison Live!, our virtual meeting space. To access the event, click the Collaboration Space link in the Edison Live! section of the course site a few minutes before the designated time. Use the following link for directions and helpful videos about [how to use the Edison Live! tool in Moodle](#). Both synchronous events will focus on the interim report of the final project. See the **Module 2 and Module 4** areas of the course web site for further details.

Midterm Project

You are required to submit a midterm research project in the form of a paper in which you assume the role of a hedge fund manager or investment manager investing for your clients' funds in stocks based on profit sharing. You are required to research the stock market and choose two stocks to invest in and write a 4-6 page research report on your investment decision.

See the **Midterm Project** area of the course web site for further details.

Final Project

You are required at the end of the course to submit a final project in the form of a paper in which you assume the role of an investment manager investing for your clients' funds in two foreign currencies based on profit sharing. You are required to research the foreign currencies as soon as possible after initial consultations with your mentor regarding what directions to pursue.

You will produce your final project in four different stages as part of your course work:

Stage 1

By the end of Module 1 you will inform your mentor which foreign currencies you are thinking of researching. Your mentor will help you with feedback regarding your choices and how to proceed with your research.

Stage 2

During Module 2 you will organize the information you have gathered into an interim report that you will share with your classmates and mentor during a synchronous event. Your mentor will coordinate arrangements for sharing your report and taking part in the discussion.

Stage 3

After participating in the Module 2 synchronous discussion forum and reflecting on any suggestions, advice, observations, etc., made by your classmates and mentor, you will decide on which foreign currencies you would like to invest (choose two hard currencies). You will update your interim report to include this choice and a brief explanation regarding why you have selected these particular foreign currencies. You will submit the updated interim report to your mentor for grading at the end of Module 3. During Module 3 you will also participate a second synchronous event during which you will have the opportunity to discuss your final project further.

Stage 4

By the end of Module 4 you will complete and submit your final project paper. See the **Final Project** area of the course web site for further details.

GRADING AND EVALUATION

Your grade in the course will be determined as follows:

- **Discussion forums (8)**—24%
- **Written assignments (4)**—24%
- **Synchronous Events (2)**—8%
- **Midterm project**—20%
- **Final project**—24%
 - Final project stage 1 assignment (1%)
 - Final project interim report (3%)
 - Final project paper (20%)

All activities will receive a numerical grade of 0–100. You will receive a score of 0 for any work not submitted. Your final grade in the course will be a letter grade. Letter grade equivalents for numerical grades are as follows:

A	=	93–100	B	=	83–87
A–	=	90–92	C	=	73–82
B+	=	88–89	F	=	Below 73

To receive credit for the course, you must earn a letter grade of C or higher on the weighted average of all assigned course work (e.g., assignments, discussion postings, projects, etc.). Graduate students must maintain a B average overall to remain in good academic standing.

STRATEGIES FOR SUCCESS

First Steps to Success

To succeed in this course, take the following first steps:

- Read carefully the entire Syllabus, making sure that all aspects of the course are clear to you and that you have all the materials required for the course.
- Take time to read the entire Online Student Handbook. The Handbook answers many questions about how to proceed through the course, and how to get the most from your educational experience at Thomas Edison State University.
- Familiarize yourself with the learning management systems environment—how to navigate it and what the various course areas contain. If you know what to expect as you navigate the course, you can better pace yourself and complete the work on time.
- If you are not familiar with Web-based learning be sure to review the processes for posting responses online and submitting assignments before class begins.

Study Tips

Consider the following study tips for success:

- To stay on track throughout the course, begin each week by consulting the Course Calendar. The Calendar provides an overview of the course and indicates due dates for submitting assignments, posting discussions, and scheduling and taking examinations.
- Check Announcements regularly for new course information.

COMMITMENT TO DIVERSITY, EQUITY, AND INCLUSION

Thomas Edison State University recognizes, values, and relies upon the diversity of our community. We strive to provide equitable, inclusive learning experiences that embrace our students' backgrounds, identities, experiences, abilities, and expertise.

ACCESSIBILITY AND ACCOMMODATIONS

Thomas Edison State University recognizes disability as a facet of diversity and seeks to advance access to its educational offerings. Students with disabilities may seek accommodations by contacting the Office of Student Accessibility Services via email at ada@tesu.edu or phone at (609) 984-1141, ext. 3415. Individuals who are deaf or hard of hearing may call the TTY line at (609) 341-3109.

ACADEMIC POLICIES

To ensure success in all your academic endeavors and coursework at Thomas Edison State University, familiarize yourself with all administrative and academic policies including those related to academic integrity, course late submissions, course extensions, and grading policies.

For more, see:

- [University-wide policies](#)
- [Undergraduate course policies and regulations](#)
- [Graduate academic policies](#)
- [Nursing student policies](#)
- [Academic code of conduct](#)