## CALIFORNIA STATE UNIVERSITY CHANNEL ISLANDS NEW COURSE PROPOSAL

112		5				
1. Catalog Description of the Course. [Follow accepted catalog format.]						
<ul> <li>3 hours lecture per week hours blank per v</li> <li>➢ Prerequisites FIN300</li> <li>☐ Corequisites</li> <li>Description</li> <li>Introduction to different</li> </ul>	k week 0 nt investment strategies alon, of markets, market indicators	g with the securities av				
Gen Ed	Graded	Repeatable for up to units				
Categories						
Title V Section 4040	04: Government US C	onstitution US Histo	ry			
Mode of Instruction.						
	Hours per           Units         Unit           3         1	Benchmark Enrollment 25	Graded Component	CS & HEGIS # (filled in by Dean)		
<ul> <li>Justification and Learning Objectives for the Course. (Indicate whether required or elective, and whether it meets University Writing, and/or Language requirements) [Use as much space as necessary] This is a required course for the Finance Emphasis. Upon successful completion of the course, students should be able to: <ul> <li>(1) explain the concept of valuation of securities through risk-return tradeoffs,</li> <li>(2) evaluate hybrid and derivative securities,</li> <li>(3) distinguish among efficient market hypotheses, technical analyses, fundamental analyses and random walk theory,</li> <li>(4) analyze the essentials of portfolio management,</li> <li>This course does not meet university writing, and/or language requirements.</li> </ul> </li> </ul>						
			$\mathbf{D}$			
If Yes, indicate GE category and attach GE Criteria Form:						
A-1 Oral Communication A-2 English Writing A-3 Critical Thinking <b>B</b> (Mathematics, Science B-1 Physical Sciences B-2 Life Sciences – Biol B-3 Mathematics – Math B-4 Computers and Infor C (Fine Arts, Literatur C-1 Art C-2 Literature Courses C-3a Language	on <b>Ices &amp; Technology</b> ) blogy hematics and Applications prmation Technology					
	COGRAM AREA       BI         Catalog Description of         Prefix FIN Course# 41:         3 hours lecture per wee         hours blank per         > Prerequisites FIN30         Corequisites         Description         Introduction to different         features such as types         regulation are covered.         □ Gen Ed         Categories         □ Lab Fee Required         □ Title V Section 404         Mode of Instruction.         U         Lecture         Seminar         Laboratory         Activity         Justification and Lear         Writing, and/or Langua         This is a required course         Upon successful complet         (1) explain the concept of         (2) evaluate hybrid and         (3) distinguish among e         (4) analyze the essential         This course does not me         Is this a General Educ         If Yes, indicate GE cat         A (English Language,         A-1 Oral Communicatio         A-2 English Writing         A-3 Critical Thinking         B (Mathematics, Sciences         B-2 Life Sciences – Bi	COGRAM AREA       BUSINESS AND ECONOMICS         Catalog Description of the Course. [Follow accepted         Prefix FIN Course# 413 Title INVESTMENT ANAI         3 hours lecture per week         hours blank per week         Prerequisites FIN300         Corequisites         Description         Introduction to different investment strategies along         features such as types of markets, market indicators         regulation are covered.         Gen Ed       CR/NC         Categories         Lab Fee Required       A - F         Optional (Student's)         Title V Section 40404:       Government         Mode of Instruction.         Mode of Instruction.         Justification and Learning Objectives for the Court         Writing, and/or Language requirements) [Use as muc         This is a required course for the Finance Emphasis.         Upon successful completion of the course, students sh         (1) explain the concept of valuation of securities.         (2) evaluate hybrid and derivative securities,         (3) distinguish among efficient market hypotheses, tec         (4) analyze the essentials of portfolio management,         This course does not meet university writing, and/or lat         Is this a General Education Course       YES </th <th>OGRAM AREA       BUSINESS AND ECONOMICS         Catalog Description of the Course. [Follow accepted catalog format.]         Prefix FIN Course# 413 Title INVESTMENT ANALYSIS Units (3)         3 hours lecture per week         hours blank per week         Prerequisities FIN300         Corequisites         Description         Introduction to different investment strategies along with the securities and features such as types of markets, market indicators, investment banking, tregulation are covered.         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#### D (Social Perspectives) E (Human Psychological and Physiological Perspectives) UD Interdisciplinary

#### 5. Course Content in Outline Form. [Be as brief as possible, but use as much space as necessary]

- 1. Introduction to Investments
- 2. Securities Markets and Securities Trading
- 3. Economic Analysis and Industry Analysis
- 4. Valuation of the Individual Firm
- 5. Technical Analyses
- 6. Efficient Market Hypothesis
- 7. Bond Valuation
- 8. Duration and Reinvestment Concepts
- 9. Convertible Bonds
- 10. Warrants, Options and Futures
- 11. Portfolio Management and Capital Asset Pricing Model
- 12. Portfolio Performance

Does this course overlap a course offered in your academic program? YES  $\square$  NO  $\boxtimes$  If YES, what course(s) and provide a justification of the overlap?

Does this course overlap a course offered in another academic area? YES NO Signature of Academic Chair(s) of the other academic area(s) is required on the signature sheet below.

## 6. Cross-listed Courses (Please fill out separate form for each PREFIX)

List Cross-listed Courses

Signature of Academic Chair(s) of the other academic area(s) is required on the signature sheet below.

Department responsible for staffing:

7. **References.** [Provide 3 - 5 references on which this course is based and/or support it.]

Fundamentals of Investment Management, Hirt and Block, McGraw-Hill/Irwin

Investments Analysis and Management, Charles Jones, John Wiley & Sons

Fundamentals of Investing, Gitman & Joehnk, Harper Collins

Fundamentals of Investments, Alexander, Sharpe and Bailey, Prentice Hall

Investments, Levy, ITP publishers

Essentials of Investments, Reily & Norton, Dryden Press.

#### 8. List Faculty Qualified to Teach This Course.

Pricilla Liang, PhD, and other Smith School faculty

#### 9. Effective Date and Frequency.

- a. Projected semesters to be offered: Fall  $\boxtimes$  Spring  $\boxtimes$  Summer  $\square$
- b. First semester offered: 2007

### 10. New Resources Required. YES 🗌 NO 🖂

If YES, list the resources needed and obtain signatures from the appropriate programs/units on the sheet below.

- a. Computer (data processing), audio visual, broadcasting needs, other equipment)
- b. Library needs
- c. Facility/space needs
- **11.** Will this new course alter any degree, credential, certificate, or minor in your program? YES INO IF, YES attach a program modification form for all programs affected.

Priscilla Liang

Proposer of Course

10/23/2006 Date

# Approval Sheet Program/Course:

Program Chair(s)	Date	
General Education Chair(s)	Date	
Curriculum Committee Chair(s)	Date	
Dean of Faculty	Date	