

**CALIFORNIA STATE UNIVERSITY CHANNEL ISLANDS
NEW COURSE PROPOSAL**

DATE 11.8.06
PROGRAM AREA BUSINESS AND ECONOMICS

1. 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

- Prerequisites FIN300
 Corequisites

Description

Introduction to different investment strategies along with the securities available to the investor. Institutional features such as types of markets, market indicators, investment banking, types of orders and securities markets regulation are covered.

- Gen Ed CR/NC Repeatable for up to units
 Categories
 Lab Fee Required A - F Optional (Student's choice) Multiple Enrollment in same semester
 Title V Section 40404: Government US Constitution US History

2. Mode of Instruction.

	Units	Hours per Unit	Benchmark Enrollment	Graded Component	CS & HEGIS # (filled in by Dean)
Lecture	3	1	25	<input checked="" type="checkbox"/>	_____
Seminar	_____	_____	_____	<input type="checkbox"/>	_____
Laboratory	_____	_____	_____	<input type="checkbox"/>	_____
Activity	_____	_____	_____	<input type="checkbox"/>	_____

3. 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:

- (1) explain the concept of valuation of securities through risk-return tradeoffs,
- (2) evaluate hybrid and derivative securities,
- (3) distinguish among efficient market hypotheses, technical analyses, fundamental analyses and random walk theory,
- (4) analyze the essentials of portfolio management,

This course does not meet university writing, and/or language requirements.

4. Is this a General Education Course YES NO

If Yes, indicate GE category and attach GE Criteria Form:

A (English Language, Communication, Critical Thinking)

- A-1 Oral Communication
 A-2 English Writing
 A-3 Critical Thinking

B (Mathematics, Sciences & Technology)

- B-1 Physical Sciences
 B-2 Life Sciences – Biology
 B-3 Mathematics – Mathematics and Applications
 B-4 Computers and Information Technology

C (Fine Arts, Literature, Languages & Cultures)

- C-1 Art
 C-2 Literature Courses
 C-3a Language
 C-3b Multicultural

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 NO
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
If YES, what course(s) and provide a justification of the overlap?

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 Spring Summer
- 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 NO

If, YES attach a program modification form for all programs affected.

Priscilla Liang

Proposer of Course

10/23/2006

Date

