CALIFORNIA STATE UNIVERSITY CHANNEL ISLANDS **COURSE MODIFICATION PROPOSAL** Courses must be submitted by October 15, 2010, and finalized by the end of the fall semester to make the next catalog (2011-12) production

DATE (CHANGE DATE EACH TIME REVISED): 9.28.10 REV 11.17.10 PROGRAM AREA(S):BUS Directions: All of sections of this form must be completed for course modifications. Use YELLOWED areas to enter data. All documents are stand alone sources of course information.

1. Course Information.

[Follow accepted catalog format.] (Add additional prefixes i f cross-listed)

OLD	
Prefix FIN Course# 413 Title INVESTMENT ANA	ALYSIS Prefix FIN Course# 413 Title INVESTMENT ANALYSIS
Units (3)	Units (3)
3 hours lecture per week	3 hours lecture per week
hours blank per week	hours blank per week
X Prerequisites: FIN 300	X Prerequisites: FIN 300

Consent of Instructor Required for Enrollment Corequisites:

Catalog Description (Do not use any symbols): 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.

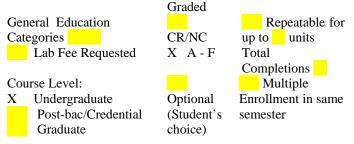
J I		Graded	
Ger	neral Education		Repeatable
Cat	egories <mark>e</mark>	CR/NC	for up to units
	Lab Fee Requested	X A - F	Total
			Completions
Cot	irse Level:		Multiple
Х	Undergraduate	Optional	Enrollment in
	Post-bac/Credential	(Student's	same semester
	Graduate	choice)	

Mode of Instruction (Hours per Unit are defaulted) 2.

NTEXX/

Consent of Instructor Required for Enrollment Corequisites:

Catalog Description (Do not use any symbols): Introduction to different investment instruments and strategies along with the securities available to the investor. Explores types of markets, market indicators, investment banking, types of orders and securities markets regulation.

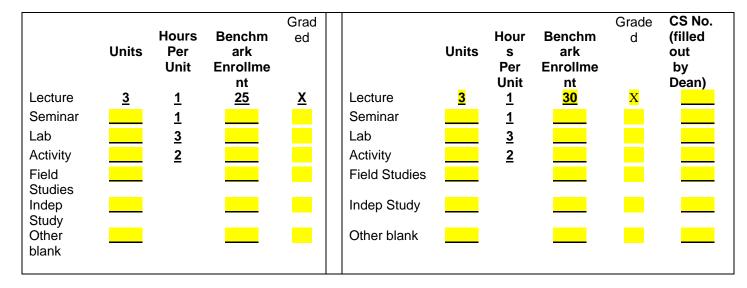


Proposed

Hegis Code(s)_

(Provided by the Dean)





3. Course Attributes:

General Education Categories: All courses with GE category notations (including deletions) must be submitted to the GE website: http://summit.csuci.edu/geapproval. Upon completion, the GE Committee will forward your documents to the Curriculum Committee for further processing.

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) **UDIGE/INTD Interdisciplinary Meets University Writing Requirement** Meets University Language Requirement

American Institutions, Title V Section 40404: Government US Constitution US History Refer to website, Exec Order 405, for more information: http://senate.csuci.edu/comm/curriculum/resources.htm Service Learning Course (Approval from the Center for Community Engagement must be received before you can request this course attribute).

Justification and Requirements for the Course. [Make a brief statement to justify the need for the course] 4.

OLD

This is a required course for the Finance Emphasis.

- Х Elective for the Major/Minor
- Free Elective

Submit Program Modification if this course changes your program.

- http://senate.csuci.edu/comm/curriculum/resources.htm)
 - Upon completion of the course, the student will be able to: OLD
 - 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 5. language requirements.

NEW

This is a required course for the Finance Option.

- Requirement for the Major/Minor
- X Elective for the Major/Minor
 - Free Elective
- 5. Student Learning Outocmes. (List in numerical order. You may wish to visit resource information at the following website:

Upon completion of the course, the student will be able to:* NEW

- 1. Explain orally and in writing the concept of valuation of securities through risk-return tradeoffs (1,2,3,5)
- 2. Evaluate hybrid and derivative securities (1,5)
- Distinguish among efficient market hypotheses, 3. technical analyses, fundamental analyses and random walk theory and present orally and in writing (1,2,3,5)
- Analyze the essentials of portfolio management and 4. present orally and in writing. (1,2,3,5)

*Aligns with Program Learning Goals for: 1)Critical thinking, 2) Oral communication, 3) Written Communication, 4) Conduct (Ethics), 5) Competencies in discipline, 6) Collaboration

6. Course Content in Outline Form. (Be as brief as possible, but use as much space as necessary) OLD

NEW

1. Introduction to Investments

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- 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

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Does this course content overlap with a course offered in your academic program? Yes	No X
If YES, what course(s) and provide a justification of the overlap.	

Does this course content overlap a course offered in another academic area? Yes _____ No X If YES, what course(s) and provide a justification of the overlap.

Overlapping courses require Chairs' signatures.

- 7. Cross-listed Courses (Please note each prefix in item No. 1)
 - A. List cross-listed courses (Signature of Academic Chair(s) of the other academic area(s) is required).
 - B. List each cross-listed prefix for the <u>course</u>:
 - C. Program responsible for staffing:
- 8. References. [Provide 3-5 references]

OLD

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.

NEW

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9. Tenure Track Faculty qualified to teach this course.

Priscilla Liang, PhD Other Smith School faculty

- 10. Requested Effective Date or First Semester offered:
- 11. New Resource Requested: Yes No X If YES, list the resources needed.
 - A. Computer Needs (data processing, audio visual, broadcasting, other equipment, etc.)
 - B. Library Needs (streaming media, video hosting, databases, exhibit space, etc.)
 - C. Facility/Space/Transportation Needs:
 - D. Lab Fee Requested: Yes No (Refer to the Dean's Office for additional processing) E. Other.

12. Indicate Changes and Justification for Each. [Check all that apply and follow with justification. Be as brief as possible but,

use as much space as necessary.]			
	Course title		Course Content
	Prefix/suffix	Х	Course Learning Outcomes
	Course number		References
	Units		GE
	Staffing formula and enrollment limits		Other
	Prerequisites/Corequisites		Reactivate Course
XC	Catalog description		
XN	Adde of Instruction		

Justification: Updated Student Learning Objectives (SLO) and aligns SLO with Program Learning Goals (PLG)

13.	Will this course modification alter any degree, credential, certificate, or minor in your program? Yes	No X
	If, YES attach a program update or program modification form for all programs affected.	
	Priority deadline for New Minors and Programs: October 4, 2010 of preceding year.	
	Priority deadline for Course Proposals and Modifications: October 15, 2010.	
	Last day to submit forms to be considered during the current academic year: April 15 th .	

William P. Cordeiro

Proposer(s) of Course Modification Type in name. Signatures will be collected after Curriculum approval.

Date

Approval Sheet

Course:

If your course has a General Education Component or involves Center affiliation, the Center will also sign off during the approval process.

Multiple Chair fields are available for cross-listed courses.

Program Chair		
	Signature	Date
Program Chair		
	Signature	Date
Program Chair		
	Signature	Date
General Education Chair		
	Signature	Date
Center for Intl Affairs Director		
	Signature	Date
Center for Integrative Studies Director		
Director	Signature	Date
Center for Multicultural Engagement Director		
	Signature	Date
Center for Civic Engagement and Service Learning Director		
	Signature	Date
Curriculum Chair		
	Signature	Date
Dean of Faculty		
	Signature	Date

Signature