

Course Outline of Record

1. Course Code: BUFI-013
2.
 - a. Long Course Title: Investment Opportunities
 - b. Short Course Title: INVSTMNT OPPRTUNTIES
3.
 - a. Catalog Course Description:

This course provides students with an understanding of the importance of investment in their personal finances as well as various investment opportunities available to them. It presents the features of different types of stocks, corporate bonds, government securities, mutual funds, options, futures, and real estate investments. It also offers students a set of tools and criteria for evaluating these investment instruments in light of their own financial conditions and objectives. Students may choose the Pass/No Pass grading option.
 - b. Class Schedule Course Description:

This course is designed to make students familiar with a wide range of investment instruments including stocks, bonds, mutual funds and real estate.
 - c. Semester Cycle (*if applicable*): Once a year or as needed
 - d. Name of Approved Program(s):
 - ACCOUNTING Certificate of Achievement
 - GENERAL BUSINESS AA Degree for Employment Preparation
4. Total Units: 3.00 Total Semester Hrs: 54.00
 Lecture Units: 3 Semester Lecture Hrs: 54.00
 Lab Units: 0 Semester Lab Hrs: 0
 Class Size Maximum: 40 Allow Audit: No
 Repeatability No Repeats Allowed
 Justification 0
5. Prerequisite or Corequisite Courses or Advisories:

Course with requisite(s) and/or advisory is required to complete Content Review Matrix (CCForm1-A)

 Advisory: ENG 070
 Advisory: MATH 060
6. Textbooks, Required Reading or Software: (*List in APA or MLA format.*)
 - a. Bodie, Zvi (2017). *Essentials of Investments* (10th./e). McGraw-Hill. ISBN: 978007783542
 College Level: Yes
 Flesch-Kincaid reading level: N/A
7. Entrance Skills: *Before entering the course students must be able:*

Advisory skills:

a.
Read and comprehend college-level text books.

- ENG 070 - Comprehend and summarize readings.
- ENG 070 - Read and identify main ideas and supporting details.

b.
Perform basic math functions - add, subtract, multiply.

- MATH 060 - Compute using the four basic operations of addition, subtraction, multiplication, and division on the rational numbers in both fraction and decimal form.

BUFI 013-Investment Opportunities

8. Course Content and Scope:

Lecture:

1. The investment environment -- the importance of investments, investment markets, sources of investment information, measuring investment returns.
2. Investing in stocks -- stocks, preferred stocks, and common stocks.
3. Investing in fixed income securities -- corporate bonds, government securities, municipal bonds, asset backed securities.
4. Investing in mutual funds -- a wide range of investment opportunities.
5. Investing in derivatives -- puts, calls, rights, warrants.
6. Investing in commodities and currencies.
7. Investing in real estate and other tangible assets.
8. Investing in Life Insurance and Annuities.
9. Tax considerations of investments.
10. Portfolio construction and management.

Lab: (if the "Lab Hours" is greater than zero this is required)

9. Course Student Learning Outcomes:

1.
Identify and analyze key financial investment vehicles such as stocks, bonds or mutual funds.
2.
Analyze various investment opportunities by comparing and evaluating risk versus return.
3.
Understand various strategies in building a personal investment portfolio.

10. Course Objectives: *Upon completion of this course, students will be able to:*

- a. Understand and appreciate the importance of investment decisions in his/her finances.
- b. Identify the range of investment opportunities available to him/her.
- c. Track the performance of the financial markets, as well as individual investment instruments.
- d. Develop his/her investment objectives and structure a simple investment portfolio consistent with those objectives.
- e. Recognize the complexity of some investment instrument, the risks involved, and the importance of professional advice in complex investment instruments.
- f. Understand and critically evaluate economic and financial news and information which affect investment markets.
- g. Make more informed Investment decisions.

11. Methods of Instruction: *(Integration: Elements should validate parallel course outline elements)*

- a. Activity
- b. Collaborative/Team
- c. Demonstration, Repetition/Practice
- d. Discussion
- e. Individualized Study
- f. Lecture
- g. Participation

Other Methods:

Problem solving and/or any other method that the instructor deems appropriate. To the extent possible, use of computer, economic and finance software, and internet to enhance student learning.

12. Assignments: *(List samples of specific activities/assignments students are expected to complete both in and outside of class.)*

In Class Hours: 54.00

Outside Class Hours: 108.00

BUFI 013-Investment Opportunities

a. In-class Assignments

b. Out-of-class Assignments

1. Read the assigned material and actively participate in class discussion of the topics.
 2. Review and provide a critical evaluation of the information and trends in different investment instruments and markets.
 3. Prepare a simple but complete investment portfolio with explanation in support of the portfolio.

13. Methods of Evaluating Student Progress: *The student will demonstrate proficiency by:*

- Written homework
- Term or research papers
- Presentations/student demonstration observations
- Group activity participation/observation
- True/false/multiple choice examinations
- Mid-term and final evaluations
- Student participation/contribution
- Other
 - a. Primarily a combination of MC, problem, and essay test and/or any other method deemed appropriate by the instructor.
 - b. Completion and presentation to class of a comprehensive investment option(s) or equivalent as deemed appropriate by the instructor of the course.

14. Methods of Evaluating: Additional Assessment Information:

15. Need/Purpose/Rationale -- *All courses must meet one or more CCC missions.*

PO - Career and Technical Education

Apply critical thinking skills to research, evaluate, analyze, and synthesize information.

IO - Personal and Professional Development

Self-evaluate knowledge, skills, and abilities.

Develop realistic goals.

Display habits of intellectual exploration, personal responsibility, and physical well being.

Demonstrate an understanding of ethical issues to make sound judgments and decisions.

Value diverse cultures and populations.

Value the feedback of others.

IO - Scientific Inquiry

Analyze quantitative and qualitative information to make decisions, judgments, and pose questions.

IO - Critical Thinking and Communication

Conduct research, gather and evaluate appropriate information, organize evidence into oral and written presentation, using proper MLA, APA, and other discipline-specific formats to cite sources.

IO - Global Citizenship - Scientific & Technological Literacy

Produce oral and written information in various modes and media, using technology such as computers, the Internet, and library databases.

IO - Global Citizenship - Ethical Behavior

Appreciate the complexity of global relationships between self and others, as well as self and the environment.

16. Comparable Transfer Course

University System	Campus	Course Number	Course Title	Catalog Year
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17. Special Materials and/or Equipment Required of Students:

18. Materials Fees: Required Material?

Material or Item	Cost Per Unit	Total Cost
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19. Provide Reasons for the Substantial Modifications or New Course:

Periodic review and textbook update.

20. a. Cross-Listed Course (*Enter Course Code*): *N/A*
 b. Replacement Course (*Enter original Course Code*): *N/A*

21. Grading Method (*choose one*): Pass/No Pass Optional

22. MIS Course Data Elements

- a. Course Control Number [CB00]: CCC000302375
- b. T.O.P. Code [CB03]: 50400.00 - Banking and Finance
- c. Credit Status [CB04]: D - Credit - Degree Applicable
- d. Course Transfer Status [CB05]: B = Transfer CSU
- e. Basic Skills Status [CB08]: 2N = Not basic skills course
- f. Vocational Status [CB09]: Possibly Occupational
- g. Course Classification [CB11]: Y - Credit Course
- h. Special Class Status [CB13]: N - Not Special
- i. Course CAN Code [CB14]: *N/A*
- j. Course Prior to College Level [CB21]: Y = Not Applicable
- k. Course Noncredit Category [CB22]: Y - Not Applicable
- l. Funding Agency Category [CB23]: Y = Not Applicable
- m. Program Status [CB24]: 1 = Program Applicable

Name of Approved Program (*if program-applicable*): ACCOUNTING,GENERAL BUSINESS

Attach listings of Degree and/or Certificate Programs showing this course as a required or a restricted elective.)

23. Enrollment - Estimate Enrollment

First Year: 0
 Third Year: 0

24. Resources - Faculty - Discipline and Other Qualifications:

- a. Sufficient Faculty Resources: Yes
- b. If No, list number of FTE needed to offer this course: *N/A*

25. Additional Equipment and/or Supplies Needed and Source of Funding.

N/A

26. Additional Construction or Modification of Existing Classroom Space Needed. (*Explain:*)

N/A

27. FOR NEW OR SUBSTANTIALLY MODIFIED COURSES

Library and/or Learning Resources Present in the Collection are Sufficient to Meet the Need of the Students Enrolled in the Course: Yes

28. Originator John Gerardi Origination Date 03/03/17