

FIN 320 – Investments

Course Description

Covers portfolio management, including the management of investments in stocks, bonds and other financial instruments. Examines individual financial instruments in depth and the investment strategies of shifting the relative amounts held by the investor during changing economic conditions.

Instructional Materials

Bodie, Z., Kane, A., & Marcus, A. (2010). *Essentials of investments: 2011 custom edition* (8th ed.). Boston, MA: McGraw-Hill.

Course Learning Outcomes

1. Describe common debt and equity securities, and analyze the relative risks and returns associated with each.
2. Explain how the securities business works through stockbrokers and investment bankers using the physical exchanges, network exchanges, and OTC markets.
3. Perform and interpret basic security analyses using indexes, averages, and various technical methods, as well as compounding, discounting, and forecasting.
4. Explain how to apply various strategies in the management of financial investment portfolios in order to optimize profits (and minimize taxes) within acceptable risks.
5. Find and utilize sources of pertinent investing information on a company, its industry, the economy as a whole, and the international environment to analyze investment potential.
6. Explain the considerations for investments of options, convertibles, warrants, rights, and commodities.
7. Illustrate how to use hybrid and derivative instruments such as convertibles, warrants, rights, options, and futures contracts in investment strategies.
8. Explain the mechanics of retirement plans such as IRA, Roth IRA, and 401(k).
9. Use technology and information resources to research issues in investments.
10. Write clearly and concisely about investments using proper writing mechanics.