



BUS 265: Investments

Students will learn about capital markets and the investment management industry. They will learn how to make sound investment decisions through the use of fundamental analysis. Students will learn about mutual funds, stock and bond investments and create a portfolio management software. Prerequisite(s): ACC 102 or BUS 112 or BUS 253 or permission of the department chair or division dean. Three lecture hours per week.

Course Student Learning Outcomes

1. Identify the role capital markets play in our economy and society. 2. Apply the economic concepts and measures, such as supply and demand, GDP, business cycles, interest rates, inflation and exchange rates and their impact on asset values. 3. Differentiate between the fundamental and technical analysis approach to asset valuation and the terminology used. 4. Build an optimal client portfolio with allocation of wealth between risky assets and risk free securities. 5. Apply an asset allocation strategy based upon a client's risk tolerance. 6. Make recommendations when allocating 401K plan assets, mutual fund assets, or bond fund assets.

Credits: 3

Program: Business