

# COURSE SYLLABUS



COURSE TITLE: Investments 1

CLASS SECTION: FIN 220-001

TERM: 2024 Fall

COURSE CREDITS: 3

DELIVERY METHOD(S): In-Person - Wednesday 6:00 PM – 8:50 PM CBA 211

Camosun College respectfully acknowledges that our campuses are situated on the territories of the Ləkʷəŋən (Songhees and Kosapsum) and WSÁNEĆ peoples. We honour their knowledge and welcome to all students who seek education here.

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## INSTRUCTOR DETAILS

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NAME: Cyrus Kanga

EMAIL: [kangac@camosun.ca](mailto:kangac@camosun.ca)

OFFICE: CBA 240

HOURS: TBA (I encourage students to contact me to set up in-person or virtual/phone discussions)

*As your course instructor, I endeavour to provide an inclusive learning environment. However, if you experience barriers to learning in this course, do not hesitate to discuss them with me. Camosun College is committed to identifying and removing institutional and social barriers that prevent access and impede success.*

## CALENDAR DESCRIPTION

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The calendar description is available on the web at: <http://camosun.ca/learn/calendar/current/web/fin.html>

\* Please note: This outline will not be kept indefinitely. It is recommended that students keep this outline for their records, especially to assist in transfer credit.

**PREREQUISITE(S):** A grade of C in Acct 100 and Fin 110

## COURSE LEARNING OUTCOMES / OBJECTIVES

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This course is an introduction to Canadian investment and capital markets. Topics will include the analysis of financial statements and other published data, the role of an investment dealer and a study of investment instruments: equities, options, rights, warrants and mutual funds.

Upon successful completion of this course, students will be able to:

1. Identify the role and activities of market participants to understand how a market functions.
2. Differentiate, explain, and calculate the different types of financial instruments, including derivatives, in the context of financial decision-making.
3. Interpret financial statements and indices to make investment decisions.
4. Understand and explain the impact of monetary policy on different investment decisions.
5. Evaluate the impact of risk on investment decisions.

6. Function in a responsible and accountable manner respecting the legal, ethical, and social parameters of the finance environment.

#### REQUIRED MATERIALS & RECOMMENDED PREPARATION / INFORMATION

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**Text:** INVESTMENTS, 10th Canadian Edition; Bodie, Kane, Markus et al; McGraw-Hill Ryerson

**Other:** D2L will be used to provide additional online materials. Texas Instruments BAII+ financial calculator. Internet Access, microphone and webcam (if applicable). This course will utilize PowerPoint. Please see below for more details on course delivery.

#### COURSE SCHEDULE, TOPICS, AND ASSOCIATED PREPARATION / ACTIVITY / EVALUATION

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The following schedule and course components are subject to change with reasonable advance notice, as deemed appropriate by the instructor.

DATE	ACTIVITY or TOPIC	Chapter(s)
Sep 4	Introduction The Investment Environment	1
Sep 11	Financial Markets, Asset Classes How Securities are Traded	2,3
Sep 18	Risk, Return, and the Historical Record	5
Sep 25	Review time	
<b>Oct 2</b>	<b>Midterm Exam #1</b>	<b>1,2,3,5</b>
Oct 9	The Capital Asset Pricing Model Behavioural Finance and Technical Analysis	9,12
Oct 16	*Guest speaker* Bond Prices and Yields	14
Oct 23	The Term Structure of Interest Rates	15
Oct 30	Macroeconomic and Industry Analysis	17
<b>Nov 6</b>	<b>Midterm Exam #2</b>	<b>9, 12, 14, 15, 17</b>
Nov 13	Equity Valuation Models	18
Nov 20	Financial Statement Analysis	19
Nov 27	Options; Futures	20, 22
Dec 4	International Diversification; Course Wrap-up	25
<b>TBA</b>	<b>Final Exam (cumulative)</b>	
<b>Please do not book travel during the exam period. Alternative dates and times will not be available.</b>		

Students registered with the Centre for Accessible Learning (CAL) who complete quizzes, tests, and exams with academic accommodations have booking procedures and deadlines with CAL where advanced notice is required. Deadlines can be reviewed on the [CAL exams page](https://camosun.ca/services/academic-supports/accessible-learning/academic-accommodations-exams). <https://camosun.ca/services/academic-supports/accessible-learning/academic-accommodations-exams>

## EVALUATION OF LEARNING

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DESCRIPTION	WEIGHTING
Assignment #1	15%
Assignment #2 (Optional with weighting taken from final exam)	10%
Midterm #1 (90 minutes)	25%
Midterm #2 (90 minutes)	25%
Final Exam (Weighting is 25% if Assignment #2 is completed) (approx. 180 minutes)	35%
	<b>TOTAL</b>
	100%

If you have a concern about a grade you have received for an evaluation, please come and see me as soon as possible. Refer to the [Grade Review and Appeals](https://camosun.ca/sites/default/files/2021-05/e-1.14.pdf) policy for more information. <https://camosun.ca/sites/default/files/2021-05/e-1.14.pdf>

## COURSE GUIDELINES & EXPECTATIONS

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**Exams:** There are two midterm exams (not cumulative) and a final exam (cumulative) for this course. Students are permitted to bring one formula sheet (8x11”), double sided into exams. Cell phones, watches, music players, translators or similar devices are not permitted during exams. Students found with these devices will receive a score of zero on the exam.

Please see the section below for further information on exam requirements.

The evening version of this course includes two hours and fifty minutes instruction. In addition to attendance, students are expected to access online materials available on the course D2L site and ensure that sufficient homework is completed to make up the additional 50 minutes of day class coverage.

## SCHOOL OR DEPARTMENTAL INFORMATION

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**Assignment formatting.** The School of Business uses **APA style** for formatting assignments and citing references. Proper citations and formatting using APA style will be required. See Camosun College (2018) Library Citation Guides retrieved from: <http://camosun.ca.libguides.com/apa>.

- Where required by your instructor, submit all assignments into the D2L drop box by your last name.
- In text citations for quotes, paraphrasing, and references must be consistent with APA standards.
- Grammar, spelling, style, document formatting, citations and all referencing using APA standards will be assessed in your mark.
- All submitted work must be properly referenced to sources where required by your instructor.

- ❑ Unless otherwise specified, you are to submit your own work, any work collaborated (unless permitted by the course) will be considered in violation of the college's Student Conduct Policy. See Camosun College (2003) Student Conduct Policy from: <http://camosun.ca/about/policies/education-academic/e-2-student-services-and-support/e-2.5.pdf>.

**Deadlines and exams.** You must submit your assignments on the due date or as announced. A grade of zero will be assigned to late submissions. There are no additional assignments or make-up exams of any kind if you performed poorly on an assignment, midterm or final exam.

- EXAM DATES WILL NOT BE RESCHEDULED.** Non-attendance on scheduled exam dates results in a zero grade. Exceptions will be made only for personal emergencies or unforeseeable extenuating circumstances in accordance with the College's Final Exam Reschedule and Repeat Policy <https://camosun.ca/sites/default/files/2022-11/e-1.17.pdf>
- Students registered through the **Centre for Accessible Learning (CAL)** should discuss timelines with their instructors at the beginning of each semester.
- Medical notes must be dated, signed, and be written on letterhead or prescription paper imprinted with the physician's name and address. Notes are accepted from Physician (GP or medical specialist), Nurse Practitioner, Psychiatrist, Psychologist, Counsellor and Aboriginal Elder. Electronic notes will not be accepted. Medical documentation must be received as soon as reasonably possible.

#### Accounting and Finance Students

Want to know more about events happening in the Accounting and Finance department, including recruiting and networking events? Check out <http://camosun.ca/cpa2b> for current events.

#### STUDENT RESPONSIBILITY

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Enrolment at Camosun assumes that the student will become a responsible member of the College community. As such, each student will display a positive work ethic, assist in the preservation of College property, and assume responsibility for their education by researching academic requirements and policies; demonstrating courtesy and respect toward others; and respecting expectations concerning attendance, assignments, deadlines, and appointments.

#### SUPPORTS AND SERVICES FOR STUDENTS

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Camosun College offers a number of services to help you succeed in and out of the classroom. For a detailed overview of the supports and services visit [camosun.ca/services](http://camosun.ca/services).

Support Service	Website
Academic Advising	<a href="http://camosun.ca/services/academic-supports/academic-advising">camosun.ca/services/academic-supports/academic-advising</a>
Accessible Learning	<a href="http://camosun.ca/services/academic-supports/accessible-learning">camosun.ca/services/academic-supports/accessible-learning</a>
Counselling	<a href="http://camosun.ca/services/health-and-wellness/counselling-centre">camosun.ca/services/health-and-wellness/counselling-centre</a>
Career Services	<a href="http://camosun.ca/services/co-operative-education-and-career-services">camosun.ca/services/co-operative-education-and-career-services</a>
Financial Aid and Awards	<a href="http://camosun.ca/registration-records/financial-aid-awards">camosun.ca/registration-records/financial-aid-awards</a>

Support Service	Website
Help Centres (Math/English/Science)	<a href="https://camosun.ca/services/academic-supports/help-centres">camosun.ca/services/academic-supports/help-centres</a>
Indigenous Student Support	<a href="https://camosun.ca/programs-courses/iecc/indigenous-student-services">camosun.ca/programs-courses/iecc/indigenous-student-services</a>
International Student Support	<a href="https://camosun.ca/international">camosun.ca/international</a>
Learning Skills	<a href="https://camosun.ca/services/academic-supports/help-centres/writing-centre-learning-skills">camosun.ca/services/academic-supports/help-centres/writing-centre-learning-skills</a>
Library	<a href="https://camosun.ca/services/library">camosun.ca/services/library</a>
Office of Student Support	<a href="https://camosun.ca/services/office-student-support">camosun.ca/services/office-student-support</a>
Ombudsperson	<a href="https://camosun.ca/services/ombudsperson">camosun.ca/services/ombudsperson</a>
Registration	<a href="https://camosun.ca/registration-records/registration">camosun.ca/registration-records/registration</a>
Technology Support	<a href="https://camosun.ca/services/its">camosun.ca/services/its</a>
Writing Centre	<a href="https://camosun.ca/services/academic-supports/help-centres/writing-centre-learning-skills">camosun.ca/services/academic-supports/help-centres/writing-centre-learning-skills</a>

If you have a mental health concern, please contact Counselling to arrange an appointment as soon as possible. Counselling sessions are available at both campuses during business hours. If you need urgent support after-hours, please contact the Vancouver Island Crisis Line at 1-888-494-3888 or call 911.

## COLLEGE-WIDE POLICIES, PROCEDURES, REQUIREMENTS, AND STANDARDS

### Academic Integrity

Students are expected to comply with all College policy regarding academic integrity; which is about honest and ethical behaviour in your education journey. The following guide is designed to help you understand your responsibilities: <https://camosun.libguides.com/academicintegrity/welcome>  
Please visit <https://camosun.ca/sites/default/files/2021-05/e-1.13.pdf> for Camosun's Academic Integrity policy and details for addressing and resolving matters of academic misconduct.

### Academic Accommodations for Students with Disabilities

Camosun College is committed to achieving full accessibility for persons with disabilities. Part of this commitment includes arranging appropriate academic accommodations for students with disabilities to ensure they have an equitable opportunity to participate in all of their academic activities. If you are a student with a documented disability and think you may need accommodations, you are strongly encouraged to contact the Centre for Accessible Learning (CAL) and register as early as possible. Please visit the CAL website for more information about the process of registering with CAL, including important deadlines: <https://camosun.ca/cal>

### Academic Progress

Please visit <https://camosun.ca/sites/default/files/2023-02/e-1.1.pdf> for further details on how Camosun College monitors students' academic progress and what steps can be taken if a student is at risk of not meeting the College's academic progress standards.

### Course Withdrawals Policy

Please visit <https://camosun.ca/sites/default/files/2021-05/e-2.2.pdf> for further details about course withdrawals. For deadline for fees, course drop dates, and tuition refund, please visit <https://camosun.ca/registration-records/tuition-fees#deadlines>.

### Grading Policy

Please visit <https://camosun.ca/sites/default/files/2021-05/e-1.5.pdf> for further details about grading.

### Grade Review and Appeals

Please visit <https://camosun.ca/sites/default/files/2021-05/e-1.14.pdf> for policy relating to requests for review and appeal of grades.

### Medical / Compassionate Withdrawals

Students who are incapacitated and unable to complete or succeed in their studies by virtue of serious and demonstrated exceptional circumstances may be eligible for a medical/compassionate withdrawal (see [Medical/Compassionate Withdrawals policy](#)). Please visit <https://camosun.ca/services/forms#medical> to learn more about the process involved in a medical/compassionate withdrawal.

### Sexual Violence

Camosun is committed to creating a campus culture of safety, respect, and consent. Camosun's Office of Student Support is responsible for offering support to students impacted by sexual violence. Regardless of when or where the sexual violence occurred, students can access support at Camosun. The Office of Student Support will make sure students have a safe and private place to talk and will help them understand what supports are available and their options for next steps. The Office of Student Support respects a student's right to choose what is right for them. For more information see Camosun's Sexualized Violence Policy: <https://camosun.ca/sites/default/files/2021-05/e-2.9.pdf> and [camosun.ca/services/sexual-violence-support-and-education](https://camosun.ca/services/sexual-violence-support-and-education).

To contact the Office of Student Support: [oss@camosun.ca](mailto:oss@camosun.ca) or by phone: 250-370-3046 or 250-370-3841

### Student Misconduct (Non-Academic)

Camosun College is committed to building the academic competency of all students, seeks to empower students to become agents of their own learning, and promotes academic belonging for everyone. Camosun also expects that all students to conduct themselves in a manner that contributes to a positive, supportive, and safe learning environment. Please review Camosun College's Student Misconduct Policy at <https://camosun.ca/sites/default/files/2021-05/e-2.5.pdf> to understand the College's expectations of academic integrity and student behavioural conduct.

### Looking for other policies?

The full suite of College policies and directives can be found here: <https://camosun.ca/about/camosun-college-policies-and-directives>

**Changes to this Syllabus:** Every effort has been made to ensure that information in this syllabus is accurate at the time of publication. The College reserves the right to change courses if it becomes necessary so that course content remains relevant. In such cases, the instructor will give the students clear and timely notice of the changes.