



Campus Anchorage

School of Business

WBU Online – Virtual Campus

2. UNIVERSITY MISSION STATEMENT

Wayland Baptist University exists to educate students in an academically challenging, learning-focused, and distinctively Christian environment for professional success, and service to God and humankind.

3. COURSE NUMBER & NAME:

FINA 3341-VC99, Investments

4. TERM:

Winter 2019

Term: Winter-CMP Section VC99

Dates: from November 11th, 2019, through February 15th, 2020

Virtual Campus

5. INSTRUCTOR:

Dr. Henrique Regina

6. CONTACT INFORMATION:

Office phone: (808) 222-9407

WBU Email: hregina@wbu.edu

Cell phone: (808) 222-9407

7. OFFICE HOURS, BUILDING & LOCATION:

Monday through Saturday, 1 PM to 9 PM CST

8. COURSE MEETING TIME & LOCATION:

Meeting day & time: On-line, weekly activities starting on Mondays.

9. CATALOG DESCRIPTION:

Role of the exchange, commonly used investment vehicles, information sources, analysis and selection of investment alternatives, the mechanics of investment.

10. PREREQUISITE:

FINA 3309.

11. REQUIRED TEXTBOOK AND RESOURCE MATERIAL:

BOOK	AUTHOR	ED	YEAR	PUBLISHER	ISBN#	UPDATED
<u>Fundamentals of Investing</u>	Smart	14th	2020	Pearson Rental	9780-13517-5217	7/10/19

University Textbook Disclosure:

For student access: Every Course in Blackboard has a link to e-textbook [Vital Source] embedded in the course menu, with basic instructions.

1. Printed copies will NOT be available through our bookstore. Students can purchase via Amazon or similar vendor, but the cost is usually substantially more expensive.
2. Students will “register” to access their library and opt-out if desired.
3. Students will be able to read and interact with their textbook from that location.

12. OPTIONAL MATERIALS

None

13. COURSE OUTCOMES AND COMPETENCIES:

- Be able to understand basics of investments;
- Be able to analyze and evaluate the equity securities;
- Understand what is efficient market;
- Know the differences between fixed income and leveraged securities;
- Understand what is derivative products;
- Get familiar with portfolio management.

14. ATTENDANCE REQUIREMENTS:

As stated in the Wayland Catalog, students enrolled at one of the University’s external campuses should make every effort to attend all class meetings. All absences must be explained to the instructor, who will then determine whether the omitted work may be made up. When a student reaches that number of absences considered by the instructor to be excessive, the instructor will so advise the student and file an unsatisfactory progress report with the campus executive director. Any student who misses 25 percent or more of the regularly scheduled class meetings may receive a grade of F in the course. Additional attendance policies for each course, as defined by the instructor in the course syllabus, are considered a part of the University’s attendance policy.

15. STATEMENT ON PLAGIARISM & ACADEMIC DISHONESTY:

Wayland Baptist University observes a zero-tolerance policy regarding academic dishonesty. Per university policy as described in the academic catalog, all cases of academic dishonesty will be reported, and second offenses will result in suspension from the university.

16. DISABILITY STATEMENT:

In compliance with the Americans with Disabilities Act of 1990 (ADA), it is the policy of Wayland Baptist University that no otherwise qualified person with a disability be excluded from participation in, be denied the benefits of, or be subject to discrimination under any educational program or activity in the university. The Coordinator of Counseling Services serves as the coordinator of students with a disability and should be contacted concerning

accommodation requests at (806) 291-3765. Documentation of a disability must accompany any request for accommodations.

17. COURSE REQUIREMENTS and GRADING CRITERIA:

- Complete all assigned reading as indicated on the course schedule and complete all assignments. In case the student is unable to submit assignments on the due date, please make prior arrangements with the instructor.
- Weekly set of Assignments (100%) – There are eleven weekly set of assignments in Blackboard. Each weekly set of assignments is worth 100 points, all assignments combined. This will equate to 100 total extra points for the whole course.

Grade Scale:

90 to 100 % A

80 to 89% B

70 to 79% C

60 to 69% D

0 to 59% F

Grade Distribution:

Weekly Assignments 100%

17.1 Grade Appeal Statement: “Students shall have protection through orderly procedures against prejudices or capricious academic evaluation. A student who believes that he or she has not been held to realistic academic standards, just evaluation procedures, or appropriate grading, may appeal the final grade given in the course by using the student grade appeal process described in the Academic Catalog. Appeals may not be made for advanced placement examinations or course bypass examinations. Appeals are limited to the final course grade, which may be upheld, raised, or lowered at any stage of the appeal process. Any recommendation to lower a course grade must be submitted through the Vice President of Academic Affairs/Faculty Assembly Grade Appeals Committee for review and approval. The Faculty Assembly Grade Appeals Committee may instruct that the course grade be upheld, raised, or lowered to a more proper evaluation.”

18. TENTATIVE SCHEDULE

Week 1: 11/11/2019 to 11/17/2019

Reading:

Chapter 1 – The Investment Environment

Chapter 2 – Securities Markets and Transactions

Weekly Set of Assignments # 1, due on 11/17/2019

Week 2: 11/18/2019 to 11/24/2019

Reading:

Chapter 3 – Investment Information and Securities Transactions

Chapter 4 – Return and Risk (Appendix 4A. The Time Value of Money

Weekly Set of Assignments # 2, due on 11/24/2019

Thanksgiving Break from 11/25/2019 through 12/01/2019

No course activities will be required during this week.

Enjoy your Thanksgiving and have quality time with your loved ones.

Week 3: 12/02/2019 to 12/08/2019

Reading:

Chapter 5 – Modern Portfolio concepts

Chapter 6 – Common Stocks

Weekly Set of Assignments # 3, due on 12/08/2019

Week 4: 12/09/2019 to 12/15/2019

Reading:

Chapter 7 – Analyzing Common Stocks

Chapter 8 – Stock Valuations

Weekly Set of Assignments # 4, due on 12/15/2019

Week 5: 12/16/2019 to 12/22/2019

Reading:

Chapter 9 – Market Efficiency and Behavioral Finance

Chapter 10 – Fixed Income Securities

Weekly Set of Assignments # 5, due on 12/22/2019

Christmas Break from 12/23/2019 through 01/05/2020

No course activities will be required during this period.

Enjoy the Holidays season and have quality time with your loved ones.

Week 6: 01/06/2020 to 01/12/2020

Reading: Chapter 11 – Bond Valuation

Weekly Set of Assignments # 6, due on 01/12/2020

Week 7: 01/13/2020 to 01/19/2020

Reading:

Chapter 12 – Mutual Funds and Exchange-Traded Funds

Chapter 13 – Managing Your Own Portfolio

Weekly Set of Assignments # 7, due on 01/19/2020

Week 8: 01/20/2020 to 01/26/2020

Reading:

Chapter 14 – Options: Puts and Calls

Weekly Set of Assignments # 8, due on 01/26/2020

Week 9: 01/27/2020 to 02/02/2020

Reading:

Chapter 15 – Future Markets and Securities

Weekly Set of Assignments # 9, due on 02/02/2020

Week 10: 02/03/2020 to 02/09/2020

Reading:

Chapter 16 – Investing in Preferred Stocks

Weekly Set of Assignments # 10, due on 02/09/2020

Week 11: 02/10/2020 to 02/15/2020 (Saturday)

Reading:

Chapter 17 – Tax-Advantaged Investments

Weekly Set of Assignments # 11, due on 02/15/2020 – ***Saturday***

19. ADDITIONAL INFORMATION

Please ask questions as needed.