

Course Syllabus

[Jump to Today.](#)

 [Edit](#)

Syllabus Contract

VALENCIA COLLEGE

COURSE INFORMATION

Course Name: Personal Investments Course ID/Section: FIN 2010 CRN 16996	Length of Term: 15 weeks Full term- Monday Aug 22 - Sunday Dec 11, 2022 Modality: Online	Term/Year: Fall 2022 Course Credits: 3
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INSTRUCTOR CONTACT INFORMATION

Instructor: Bruce Clement, CFA

Contact: gcllement2@valenciacollege.edu (<mailto:gcllement2@valenciacollege.edu>)

COURSE DESCRIPTION

This course focuses on introduction of securities markets, types of personal investments, research tools, investment strategies and portfolio management.

COURSE OUTCOMES

The purpose of this course is to give students information about investments organized in a manner that is easy to understand and with real world applications. This course will provide students with the structure needed so that they are able to begin buying and selling securities upon completion of this course. Investments are not just about textbook learning; it challenges students to use their critical/creative skills in all aspects of Business and Investments, not just those covered in this course.

1. Define terms related to investments.
2. Apply basic concepts and calculations to planning and control of investments.
3. Identify analytical models used for financial decision-making.
4. Review history and risk of investments markets.
5. Discuss bonds, including interest rates, prices, and yields.
6. Understand equity valuation methods.
7. Explain the Efficient Market Hypothesis.

TEXT & REQUIRED MATERIALS

1. Investments by Charles P. Jones (Author) (14th Edition). Published by Wiley, John & Sons
2. Microsoft Excel
3. Calculator with basic math functions. A calculator with financial functions is helpful.
4. Active Valencia email account

COMPUTER SKILLS & TECHNICAL REQUIREMENTS

To participate in this Canvas course, students must have access to the Internet and a reliable digital device. For more information on technical requirements, read [Student Frequently Asked Technical Questions](https://valenciacollege.edu/faculty/canvas-resources/student-faqs.php#technicalquestions).

Students should consider the computer skills and video skills needed for this course which include:

Software application skills (Excel, Word, etc.)

Internet and library database browsing

Copying and pasting

Saving files in different formats

Working with attachments

File management

COURSE COMPETENCIES

The course seeks to strengthen students' skills applicable to Valencia's Student Core Competencies: **Think, Value, Communicate, and Act.**

IMPORTANT DATES

Important Dates

Start Date: Monday August 22	College Closed: September 5 (Labor Day) November 11 (Veterans Day) November 23-27 (Thanksgiving) College Calendar: http://valenciacollege.edu/calendar (http://valenciacollege.edu/calendar)
End Date: Sunday December 11	
Drop/ Refund Deadline: Monday August 29	
Withdrawal Deadline: Friday October 28	

COLLEGE POLICIES

No Show Policy

Class attendance is required for online classes; students who are not actively participating in an online class and/or do not submit the required attendance activity by the scheduled due date will be withdrawn by the instructor at the end of the first week as a "no show". If you are withdrawn as a "no show," you will be financially responsible for the class and a final grade of "WN" will appear on your transcript for the course."

Note: The required attendance activity is [Orientation Quiz](#).

Withdrawal Policy

Per [Valencia policy](#).

[\(http://catalog.valenciacollege.edu/academicpoliciesprocedures/courseattempts/coursewithdrawal/\)](http://catalog.valenciacollege.edu/academicpoliciesprocedures/courseattempts/coursewithdrawal/) a

student who withdraws from class before the established deadline for a particular term will receive a grade of "W". A student is not permitted to withdraw after the withdrawal deadline.

A faculty member **will** withdraw a student up to the withdrawal deadline for violation of the class attendance policy. A student who is withdrawn by faculty for violation of the class attendance policy will receive a grade of "W". After the withdrawal deadline, faculty will not withdraw a student and the student will receive the grade earned at the end of the course. Any student who withdraws or is withdrawn from a class during a third or subsequent attempt in the same course will be assigned a grade of "F." If you do not intend to complete the course, you must withdraw yourself prior to the withdrawal date.

College Student Conduct Policy

Valencia is dedicated not only to the advancement of knowledge and learning but also to the development of responsible personal and social conduct. As a registered student, you assume the responsibility for conducting yourself in a manner that contributes positively to Valencia's learning community and that does not impair, interfere with, or obstruct the orderly conduct, processes, and functions of the college as described in the [Student Code of Conduct](https://catalog.valenciacollege.edu/academicpoliciesprocedures/studentcodeofconduct/)

(<https://catalog.valenciacollege.edu/academicpoliciesprocedures/studentcodeofconduct/>).

Academic Integrity

All forms of academic dishonesty are prohibited at Valencia College. **Academic dishonesty** includes, but is not limited to, acts or attempted acts of plagiarism, cheating, furnishing false information, forgery, alteration or misuse of documents, misconduct during a testing situation, facilitating academic dishonesty, and misuse of identification with intent to defraud or deceive. Materials created by students for submission are limited to use in this course only.

All work submitted by students is expected to be the result of the students' individual thoughts, research, and self-expression. Whenever a student uses ideas, wording, or organization from another source, the source shall be appropriately acknowledged. If a student is caught submitting plagiarized work a first offense will result in a zero score on the assignment, a second offense will result a class grade of F.

Students with Disabilities

Valencia is committed to ensuring that all of its programs and services are accessible to students with disabilities. [The Office for Students with Disabilities \(OSD\)](http://valenciacollege.edu/osd/) (<http://valenciacollege.edu/osd/>) determines reasonable and appropriate accommodations for qualified students with documented disabilities based upon the need and impact of the specific disability.

How to Obtain Accommodations

Any student requiring course accommodations due to physical, emotional or learning disability must contact the instructor and provide a *Notification to Instructor* form by the end of the second week of class. To obtain a letter of accommodation, contact OSD at 407-582-2229.

Baycare Student Assistance Services

Valencia College strives to ensure all our students have a rewarding and successful college experience. To that purpose, Valencia students can get immediate help with issues dealing with stress, anxiety, depression, adjustment difficulties, substance abuse, time management as well as relationship problems dealing with school, home or work. **BayCare Behavioral Health Student Assistance Program (SAP)** [_\(http://catalog.valenciacollege.edu/student-services/baycare-student-assistance-services/\)_](http://catalog.valenciacollege.edu/student-services/baycare-student-assistance-services/) services are free to all Valencia students and available 24 hours a day by calling (800) 878-5470. If needed, the counselor may refer the student to appropriate resources or to speak face-to-face with a licensed counselor.

FERPA (Family Educational Rights and Privacy Act)

FERPA is a Federal law that is administered by the Family Policy Compliance Office in the U.S. Department of Education. FERPA affords students certain rights with respect to their educational records. Valencia College has a firm commitment to protecting the privacy rights of its students. For further information see the **FERPA policy** [_\(https://valenciacollege.edu/about/ferpa/\)_](https://valenciacollege.edu/about/ferpa/).

Statement of Support for Students with Food/Housing/Financial Needs

Any student who has difficulty accessing sufficient food to eat, or who lacks a safe and stable place to live, and believes this may affect his or her performance in the course, is urged to meet with a Counselor in the **Advising Center** [_\(https://valenciacollege.edu/students/advising-counseling/\)_](https://valenciacollege.edu/students/advising-counseling/) for information about resources that may be available from the college or community.

COLLEGE LINKS

College Catalog [_\(http://valenciacollege.edu/catalog/\)_](http://valenciacollege.edu/catalog/) **Student Handbook**
[_\(https://valenciacollege.edu/students/student-services/documents/student-handbook.pdf\)_](https://valenciacollege.edu/students/student-services/documents/student-handbook.pdf)

Microsoft Office Instructions for free software [_\(https://valenciacollege.edu/employees/office-of-information-technology/network-and-info-security-services/office-365.php\)_](https://valenciacollege.edu/employees/office-of-information-technology/network-and-info-security-services/office-365.php) **Course Support**
[_\(https://valenciacollege.edu/students/learning-support/\)_](https://valenciacollege.edu/students/learning-support/)

COURSE POLICIES

Attendance Policy

Class attendance is required during the term. Your online attendance will be checked each week. In the event of an extended absence, you should contact me via email or phone as soon as possible to indicate the reason. If you do not access the course website or contact me letting me know of your absence for a period of seven consecutive days, you will be contacted and if there is no communication within 48 hours, you will be withdrawn from the course up until the “W” deadline. After the “W” deadline, students will receive the final grade that is earned according to the course point totals.

Note to International Students (F-1 or J-1 Visa)

Please be advised that withdrawal from this course due to attendance may result in the termination of your visa status if you fall below the full-time enrollment requirement of 12 credit hours. Contact [Valencia’s International Student Services](http://international.valenciacollege.edu/contact-us/) office for more information.

Avoid No Show Reporting

Required Attendance Activity

Students must log into the course and complete the Orientation Quiz by Sunday August 28 at 11:59pm, to avoid withdrawal from the course.

Late Work/Makeup Policy

Late work may be accepted for full credit if students have a medical emergency or an ongoing medical condition. **Late work will be accepted for partial credit for up to one week (7 days) with 1 point being deducted for each day the assignment is late. After one week (7 days) the assignment will be given a grade of 0.** If you have special circumstances, please reach out by email and some flexibility may be given.

Privacy Policies and Third-Party Software

[Valencia College has a firm commitment to protecting the privacy rights of its students. Third party software privacy policies will be provided at the point of use within the course.](https://docs.google.com/document/d/10DyUpVNN8y9WP2kJelJGPTvqiNMUc9Udhdo7PI-Rh-w/edit)

Student Responsibilities

- Students must be willing to read and review assigned chapters each week.
- Students are expected to read the material to be covered before class, and to be prepared for discussion and problem solving.
- Students should read at least one of the following on a daily basis: the Business Section of a local newspaper, the financial related page of a credible news website, such as CNN, Fox News etc., or the homepage of CNBC, Bloomberg, Yahoo Finance etc.
- Discussions are due by Thursday of each week a discussion is assigned unless otherwise noted; must be at least one (1) paragraph (4-5 sentences). Responses to at least two (2) of classmates are due by the Sunday night due date. Please be thorough and respectful on the discussion board.
- Quizzes must be submitted by due date at specified time.
- The project consists of weekly updates and a final report.
- Unless otherwise noted **all** quizzes, discussions, assignments, projects and tests **will be due at 11:59PM on the due date.**

Work

Make-up work (assignments, quizzes and exams) will be allowed in the case of student emergencies. For student emergencies, it is the student's responsibility to contact the instructor and provide explanation within one week, unless special arrangements have been previously made. Documentation may be required if late-work requests become repetitive.

Students are required to take the final exam at the scheduled examination time. Failure to do so will result in a failing grade for the course. Please refer to the above statement in this section, regarding emergencies. All quizzes will be done online through Canvas. It is the responsibility of the student to complete the quiz within the dates allowed. Please remain aware of Canvas maintenance schedules. Quizzes may be completed at home; however, you must have reliable Internet access. If your Internet access at home continually or occasionally shuts off, you should take quizzes on campus. Quizzes and exams must be completed in one setting; you cannot exit and enter the quiz, there is only one attempt. You generally will have a week to take the quizzes. I will only reset quizzes if you email me that your quiz has frozen by Thursday night at the latest before the deadline (Mondays by the specified time dates). Any quizzes that freeze (Canvas kicks you out or you sign out) taken Saturday or Sunday will not reset. If you have continual problems with Canvas kicking you out of quizzes, you may have to take at the Testing Center on campus.

Grade Weighting

	Weight
Mid-Term Exam	15%

Final Exam	15%
Project	40%
Quizzes	15%
Discussions	15%
Total	100%

Grade Scale

A	90% - 100%
B	80% - 89%
C	70% - 79%
D	60% - 69%
F	59% and below

Course Schedule

Unit	Topics	Coursework Due Dates
Week 0: August 22 - 28	Orientation	Read through all of the Orientation pages
Week 1: August 22 -28	Chapter 1: Understanding Investments	Intro Discussion (due Thurs Aug 25; reply posts due Sun Aug 28) Orientation Quiz (due Sunday Aug 28) Quiz Chapter 1 (due Sunday Aug 28)
Week 2: August 29 - Sept 4	Chapter 2: Investment Alternatives	Investment Portfolio Project: Part 1 (due Friday Sept 2) Quiz Chapter 2 (due Sunday Sept 4)
Week 3: September 6 - 11	Chapter 3: Indirect Investing	Discussion: Mutual Fund Analysis (due Thurs Sept 8; reply posts due Sun Sept 11) Investment Portfolio Project: Part 2 (due Sunday Sept 11)

College closed: Sept 5 (Memorial Day)		Quiz Chapter 3 (due Sunday Sept 11)
Week 4: September 12 - 18	Chapter 4: Securities Markets	Discussion: High Freq Traders (due Thurs Sept 15; reply posts due Sun Sept 18) Investment Portfolio Project: Part 3 (due Sunday Sept 18) Quiz Chapter 4 (due Sunday Sept 18)
Week 5: September 19 - 25	Chapter 5: How Securities are Traded	Investment Portfolio Project: Part 4 (due Sunday Sept 25) Quiz Chapter 5 (due Sunday Sept 25)
Week 6: Sept 26 - October 2	Chapter 6: Returns & Risk of Investments	Discussion: Asset Class Returns & Risk (due Thurs Sept 29; replies due Sun Oct 2) Investment Portfolio Project: Part 5 (due Sunday Oct 2) Quiz Chapter 6 (due Sunday Oct 2)
Week 7: October 3 - 9	Mid-Term Exam (Chapters 1-6)	Investment Portfolio Project: Part 6 (due Sunday Oct 9) Mid-Term Exam (due Sunday Oct 9)
Week 8: October 10 - 16	Chapter 7: Portfolio Theory	Investment Portfolio Project: Part 7 (due Sunday Oct 16) Quiz Chapter 7 (due Sunday Oct 16)
Week 9: October 17 - 23	Chapter 8: Portfolio Selection	Discussion: Active v Passive Fd Analysis(due Thurs Oct 20; replies due Sun Oct 23) Investment Portfolio Project: Part 8 (due Sunday Oct 23)

		Quiz Chapter 8 (due Sunday Oct 23)
Week 10: October 24 - 30	Chapter 9: Common Stock Valuation	Discussion: Relative Value Analysis (due Thurs Oct 27; reply posts due Sun Oct 30) Investment Portfolio Project: Part 9 (due Sunday Oct 30) Quiz Chapter 9 (due Sunday Oct 30)
Week 11: Oct 31 - November 6	Chapter 10: Common Stock Analysis	Investment Portfolio Project: Part 10 (due Sunday Nov 6) Quiz Chapter 10 (due Sunday Nov 6)
Week 12: November 7 - 13 College closed: Nov 11 (Veterans Day)	Investment Project Due	Discussion: Investment Project Reflections (due Thursday Nov 10; reply posts due Sun Nov 13) Investment Portfolio Project: Summary & Analysis (due Thursday Nov 10)
Week 13: November 14 - 20	Chapter 12: Market Efficiency	Discussion: Behavioral Bias (due Thurs Nov 17; replies due Sun Nov 20) Quiz Chapter 12 (due Sunday Nov 20)
Week 14: November 21 - 27 College closed: Nov 23-27 (Thanksgiving)	Thanksgiving	None
Week 15: Nov 28 - December 4	Other Investments & Final Review	Discussion: Other Investments (due Thurs Dec 1; replies due Sun Dec 4)
Week 16: December 5 - 11	Final Exam (Chapters 7, 8, 10, 11, 12)	Final Exam due Monday December 5

*Changes to the course calendar may be made at the discretion of the professor, and students will be notified of any changes in class and/or via the Canvas Inbox conversations tool.