



DEPARTMENT OF BUSINESS

COURSE OUTLINE – WINTER 2012

BA 2730 – INVESTMENT FUNDS

INSTRUCTOR: Lori Bombier

PHONE: 780-539-2711

OFFICE: C406

E-MAIL: lbombier@gprc.ab.ca

OFFICE HOURS: Tues. & Thurs. 11:30 – 12:50

PREREQUISITE(S)/COREQUISITE: Fundamentals of Investments: Valuation and Management. Jordan, Miller, Yuce. Second Canadian Edition. McGraw-Hill Ryerson

REQUIRED TEXT/RESOURCE MATERIALS: Fundamentals of Investments: Valuation and Management. Jordan, Miller, Yuce. Second Canadian Edition. McGraw-Hill Ryerson

CALENDAR DESCRIPTION: This course offers an overview of the customers and products involved in the financial marketplace. It introduces the student to client objectives and types. Securities, financial markets, and investment portfolios are also examined. A review of mutual funds is undertaken focusing on the different types of funds, their fees and services, and how to select a fund.

CREDIT/CONTACT HOURS: BA 2730 is a 3 credit course consisting of 45 hours of instruction

DELIVERY MODE(S): BA 2730 consists of three hours of lecture per week.

OBJECTIVES (OPTIONAL):

- Be able to guide clients in their selection of mutual funds and related investment products.
- Be able to confidently describe and discuss with clients the risk/return characteristics of the different security types.
- Be able to ensure product suitability
- Be able to provide superior customer service with respect to investments

TRANSFERABILITY:

**** Grade of D or D+ may not be acceptable for transfer to other post-secondary institutions. Students are cautioned that it is their responsibility to contact the receiving institutions to ensure transferability**

GRADING CRITERIA:

Stock Market Game	25%
Mid Term	20%
Quizzes (2 @ 7.5%)	15%
Final Exam	35%
Participation	5%

Class Professionalism: 5% of the final grade will be attributed to participation and attendance in class. In order to get the most out of class regular attendance and active participation is encouraged. Repeated lateness will be viewed similar to an absence in class. 4 or more absences will be in jeopardy of receiving a zero for professionalism. Disruptive classroom behavior will also be viewed as "not professional"... i.e. excessive/disruptive talking, texting, taking phone calls, ect.

GRANDE PRAIRIE REGIONAL COLLEGE			
GRADING CONVERSION CHART			
Alpha Grade	4-point Equivalent	Percentage Guidelines	Designation
A ⁺	4.0	90 – 100	EXCELLENT
A	4.0	85 – 89.99	
A ⁻	3.7	80 – 84.99	FIRST CLASS STANDING
B ⁺	3.3	77 – 79.99	
B	3.0	73 – 76.99	GOOD
B ⁻	2.7	70 – 72.99	
C ⁺	2.3	67 – 69.99	SATISFACTORY
C	2.0	63 – 66.99	
C ⁻	1.7	60 – 62.99	
D ⁺	1.3	55 – 59.99	MINIMAL PASS
D	1.0	50 – 54.99	
F	0.0	0 – 49.99	FAIL
WF	0.0	0	FAIL, withdrawal after the deadline

EVALUATIONS:

- The midterm will be written approximately at the end of week 7.
- The final examination will be scheduled during the exam week by the registrar's office.
- The stock market game will be due March ? (The due date will be determined in class). Materials for the stock market game will be discussed and dispersed in class. **Any late assignments will be deducted 10% per day.**
- **All quizzes, mid-terms and finals will be written as scheduled.**
- ***No rewrites will be given on missed quizzes or midterms. If there is an excusable absence the weighting of the missed quiz/exam will be added onto the final exam weighting.**

STUDENT RESPONSIBILITIES:

Grande Prairie Regional College Calendar

Academic Regulations

Debarred From Exams

“You may be **refused permission to write a final examination** in a course on the advice of the instructor concerned. This usually happens when absences are excessive or if significant parts of required assignments or lab work are not completed.”

Student Conduct

- **Your responsibility** as a student is to arrive on time and remain for the duration of scheduled classes and related activities.
- **Your responsibility** as a student is to respect faculty member’s right to enforce the attendance requirements for the course.

STATEMENT ON PLAGIARISM AND CHEATING:

Refer to the Student Conduct section of the College Admission Guide at

<http://www.gprc.ab.ca/programs/calendar/> or the College Policy on Student Misconduct: Plagiarism and Cheating at www.gprc.ab.ca/about/administration/policies/**

**Note: all Academic and Administrative policies are available on the same page.

COURSE SCHEDULE/TENTATIVE TIMELINE:

Week	Topic
1	Ch. 1
2	Ch. 2
3	Ch. 2
4	Ch. 3
5	Ch. 4
6	Ch. 5
7	Ch. 6
8	Ch. 7
9	Ch. 8
10	Ch. 14
11	Ch. 19
12	Ch. 20
13	Review