

# FIN 160: STUDENT INVESTMENT FUND MANAGEMENT

## In Workflow

1. CBA College Committee Chair (jlee@csus.edu)
2. CBA Dean (mikhaili@csus.edu)
3. Academic Services (catalog@csus.edu)
4. Senate Curriculum Subcommittee Chair (curriculum@csus.edu)
5. Dean of Undergraduate (james.german@csus.edu; renee.leonard@csus.edu)
6. Dean of Graduate (cnewsome@skymail.csus.edu)
7. Catalog Editor (catalog@csus.edu)
8. Registrar's Office (w lindsey@csus.edu)
9. PeopleSoft (PeopleSoft@csus.edu)

## Approval Path

1. Wed, 11 May 2022 18:22:43 GMT  
Min Li (limin): Rollback to Initiator
2. Sun, 29 May 2022 22:16:49 GMT  
Jai Joon Lee (jlee): Approved for CBA College Committee Chair
3. Mon, 30 May 2022 19:18:41 GMT  
Andrey Mikhailitchenko (mikhaili): Approved for CBA Dean

## History

1. Mar 30, 2021 by Hao Lin (linh)
2. Mar 25, 2022 by Janett Torset (torsetj)

Date Submitted: Thu, 26 May 2022 01:24:26 GMT

**Viewing: FIN 160 : Student Investment Fund Management**

**Last approved: Fri, 25 Mar 2022 14:02:26 GMT**

**Last edit: Mon, 13 Jun 2022 21:57:38 GMT**

Changes proposed by: Min Li (101017159)

**Contact(s):**

Name (First Last)	Email	Phone 999-999-9999
David Moore	David.j.moore@csus.edu	916-278-6614

**Catalog Title:**

Student Investment Fund Management

**Class Schedule Title:**

Student Investment Fund Mgmt

**Academic Group: (College)**

CBA - Business

**Academic Organization: (Department)**

Finance, Insurance, and Real Estate

**Will this course be offered through the College of Continuing Education (CCE)?**

No

**Catalog Year Effective:**

Fall 2023 (2023/2024 Catalog)

**Subject Area: (prefix)**

FIN - Finance

**Catalog Number: (course number)**

160

**Course ID: (For administrative use only.)**

203597

**Units:**

3

**Is the primary purpose of this change to update the term typically offered or the enforcement of prerequisites at registration?**

No

**In what term(s) will this course typically be offered?**

Fall, Spring

**Does this course require a room for its final exam?**

Yes, final exam requires a room

**This course complies with the credit hour policy:**

Yes

**Justification for course proposal:**

Update prerequisite to be more inclusive of majors beyond Finance, Insurance, and Real Estate (FIRE) as well as more accommodative to FIRE majors who take the previous pre-requisite (FIN135) in their final semester.

**Course Description: (Not to exceed 80 words and language should conform to catalog copy.)**

Students will manage a real investment portfolio by applying theories of investment analysis and portfolio management. Topics include economic analysis, valuation theories, risk measurement and management, performance measurement, and benchmarking.

**Are one or more field trips required with this course?**

No

**Fee Course?**

No

**Is this course designated as Service Learning?**

No

**Is this course designated as Curricular Community Engaged Learning?**

No

**Does this course require safety training?**

No

**Does this course require personal protective equipment (PPE)?**

No

**Does this course have prerequisites?**

Yes

**Prerequisite:**

FIN 134, FIN 135, or FIN 136 with a final posted grade of B- or higher or FIN 101 with a final posted grade of A- or higher; must be in Bachelor of Science in Business Administration major or minor

**Prerequisites Enforced at Registration?**

Yes

**Does this course have corequisites?**

No

**Graded:**

Letter

**Approval required for enrollment?**

No Approval Required

**Course Component(s) and Classification(s):**

Lecture

**Lecture Classification**

CS#02 - Lecture/Discussion (K-factor=1 WTU per unit)

**Lecture Units**

3

**Is this a paired course?**

No

**Is this course crosslisted?**

No

**Can this course be repeated for credit?**

No

**Can the course be taken for credit more than once during the same term?**

No

**Description of the Expected Learning Outcomes and Assessment Strategies:**

List the Expected Learning Outcomes and their accompanying Assessment Strategies (e.g., portfolios, examinations, performances, pre-and post-tests, conferences with students, student papers). Click the plus sign to add a new row.

	Expected Learning Outcome	Assessment Strategies
1	Evaluate investment policy statement for a consistency with investment client's objectives.	homework assignments student presentations
2	Produce market and industry analysis.	homework assignments student presentations
3	Select investments consistent with the client's stated objectives.	homework assignments student presentations
4	Evaluate current portfolio holdings and potential security candidates and make buy/sell/hold recommendations to form the best portfolio based on stated investment objectives.	homework assignments student presentations
5	Evaluate portfolio performance for the consistency with the stated objectives.	homework assignments student presentations

**Assessment Strategies:** A description of the assessment strategies (e.g., portfolios, examinations, performances, pre-and post-tests, conferences with students, student papers) which will be used by the instructor to determine the extent to which students have achieved the learning outcomes noted.

Assessment strategies will include activities such as homework assignments (ELO 1-5) and student presentations (ELO 1-5).

**Attach a list of the required/recommended course readings and activities:**

FIN 160 Sample Syllabus.doc

**Is this course required in a degree program (major, minor, graduate degree, certificate?)**

No

**Does the proposed change or addition cause a significant increase in the use of College or University resources (lab room, computer)?**

No

**Will there be any departments affected by this proposed course?**

No

I/we as the author(s) of this course proposal agree to provide a new or updated accessibility checklist to the Dean's office prior to the semester when this course is taught utilizing the changes proposed here.

I/we agree

## University Learning Goals

### Undergraduate Learning Goals:

Competence in the disciplines  
Integrative learning  
Intellectual and practical skills

**Is this course required as part of a teaching credential program, a single subject, or multiple subject waiver program (e.g., Liberal Studies, Biology) or other school personnel preparation program (e.g., School of Nursing)?**

No

## GE Course and GE Goal(s)

**Is this a General Education (GE) course or is it being considered for GE?**

No

### Reviewer Comments:

**Min Li (limin) (Wed, 11 May 2022 18:22:43 GMT):** Rollback: typo

**Aravind Yuvraj (ayuvraj) (Mon, 13 Jun 2022 21:57:38 GMT):** Edited to integrate new ELO and Assessment Strategies fields.

Key: 14140