

FIN 160: STUDENT INVESTMENT FUND MANAGEMENT

In Workflow

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Approval Path

1. Thu, 14 Nov 2019 21:30:45 GMT
Marty Wilson (mcwilson): Rollback to Initiator
2. Wed, 01 Apr 2020 19:31:21 GMT
Jai Joon Lee (jlee): Approved for CBA College Committee Chair
3. Fri, 05 Jun 2020 02:09:03 GMT
Andrey Mikhailitchenko (mikhaili): Approved for CBA Dean

New Course Proposal

Date Submitted: Thu, 27 Feb 2020 21:17:14 GMT

Viewing: FIN 160 : Student Investment Fund Management

Last edit: Thu, 27 Feb 2020 21:17:13 GMT

Changes proposed by: Hao Lin (102088972)

Contact(s):

Name (First Last)	Email	Phone 999-999-9999
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Catalog Title:

Student Investment Fund Management

Class Schedule Title:

Student Investment Fund Mmgt

Academic Group: (College)

CBA - Business Administration

Academic Organization: (Department)

Business Administration

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

No

Catalog Year Effective:

Fall 2020 (2020/2021 Catalog)

Subject Area: (prefix)

FIN - Finance

Catalog Number: (course number)

160

Course ID: (For administrative use only.)

TBD

Units:

3

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

Does this course replace an existing experimental course?

No

This course complies with the credit hour policy:

Yes

Justification for course proposal:

Students currently participate the student investment fund by registering in a FIN 199 as two 2-unit courses -over 2 consecutive semesters. The commitment requirement of two consecutive semesters to complete the study limits students' availability to participate in the program. We are proposing to make the program one semester long with increased classroom time to an equivalent of a regular 3-unit course. The change will benefit students, because they will not be expected to commit to the fund for 2 semesters in a row. Making SIF management a 3-unit course will also provide students with an intensive semester-long training. In addition, the classroom meeting time will change from one 90-minute meeting per week to two 75-minute sessions per week.

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

Does this course require safety training?

No

Does this course require personal protective equipment (PPE)?

No

Does this course have prerequisites?

Yes

Prerequisite:

FIN 135 with a final posted grade of B- or higher and instructor's consent; must be in BSBA major or minor

Prerequisites Enforced at Registration?

No

Does this course have corequisites?

No

Graded:

Letter

Approval required for enrollment?

Instructor Approval

Course Component(s) and Classification(s):

Lecture

Lecture Classification

CS#02 - Lecture/Discussion (K-factor=1WTU 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: Describe outcomes using the following format: 'Students will be able to: 1), 2), etc.'

Students will be able to:

- 1) Evaluate investment policy statement for a consistency with investment client's objectives,
- 2) Produce market and industry analysis,
- 3) Select investments consistent with the client's stated objectives,
- 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,
- 5) evaluate portfolio performance for the consistency with the stated outcome objectives.

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

FIN 160 Sample Syllabus.doc

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 above.

Assessment strategies will include activities such as student presentations of corresponding portfolio sector

For whom is this course being developed?

Majors in the Dept

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:

Marty Wilson (mcwilson) (Thu, 14 Nov 2019 21:30:45 GMT):Rollback: editing

David Moore (david.j.moore) (Thu, 11 Jun 2020 23:17:25 GMT):I am the instructor for FIN196A (the experimental version of FIN160) in Fall 2020 and the current advisor to the SIF. I am concerned about the instructor's permission prerequisite. I do not think it is prudent or just, in light of recent events that highlight long term social inequities, to propose a course with a specific and apparently subjective barrier to entry. This is especially true in the absence of a transparent justification and explanation of why the barrier exists and how it is applied. Although I was on Faculty Council when this was approved, I mistakenly went along and was not mindful of this problem at the time. Again, given recent events, I think "and instructor's consent" requirement is unnecessary and should be removed to eliminate an avenue of exclusion. It is my belief that the other prerequisite, FIN135 with a B- or better, is sufficient enough to enable qualified and interested student enrollment. Furthermore, as the SIF transitions from a historically 'extra' 1 or 2 credit hour course to a 3 credit hour 'full course,' registration impediments can have a domino effect. For instance, if a student really wants to register for FIN160 but can't because a professor is unavailable to provide consent (e.g., out of town), that student may register for another unwanted class as a placeholder thereby impacting other classes. There are also financial aid ramifications. I will bring this up with Department Chair Hao Lin to see if we as a Department can agree to pull this back and remove the instructor's consent requirement.

Key: 14140