

**STATE UNIVERSITY OF NEW YORK
COLLEGE OF TECHNOLOGY
CANTON, NEW YORK**



MASTER SYLLABUS

BSAD 241 – INVESTMENT AND TRADING

CIP Code: 52.0807

*For assistance determining CIP Code, please refer to this webpage
<https://nces.ed.gov/ipeds/cipcode/browse.aspx?v=55>
or reach out to Sarah Todd at todds@canton.edu*

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**SCHOOL OF BUSINESS AND LIBERAL ARTS
BUSINESS DEPARTMENT**

FALL 2024

A. **TITLE:** Investment and Trading

B. **COURSE NUMBER:** BSAD 241

C. **CREDIT HOURS:** Three lecture hours per week for 15 weeks (3 credits)

D. **WRITING INTENSIVE COURSE:** No

E. **GER CATEGORY:** None

F. **SEMESTER(S) OFFERED:** Spring or Fall

G. **COURSE DESCRIPTION:** This course is designed for students interested in securities markets. This course will provide an opportunity for students to blend the theory of investments with the practical demands of investment management. The course objectives include an understanding of the process of establishing a portfolio strategy with a real portfolio, gaining knowledge of the mechanics of trading, principles of equity valuation and technical analysis. Students actively manage a portfolio throughout the semester.

H. **PRE-REQUISITES/CO-COURSES:**

a. Pre-requisite (s) - ACCT 101, or Instructor's Permission

b. Co-requisite (s): None

c. Pre- or co-requisite (s): None

I. **STUDENT LEARNING OUTCOMES:**

<u>Course Student Learning Outcome [SLO]</u>	<u>PSLO</u>	<u>GER</u>	<u>ISLO</u>
a. Discuss the investment environment	1	None	2 [CA]
b. Understand securities markets trading	1	None	2 [CA]
c. Analyze financial statements of firms	2	None	2 [IA]
d. Evaluate portfolio performance	2	None	2 [IA]

KEY	<u>Institutional Student Learning Outcomes</u> <u>[ISLO 1 – 5]</u>
ISLO #	ISLO & Subsets
1	Communication Skills Oral [O], Written [W]
2	Critical Thinking <i>Critical Analysis [CA] , Inquiry & Analysis [IA], Problem Solving [PS]</i>
3	Foundational Skills <i>Information Management [IM], Quantitative Lit./Reasoning [QTR]</i>
4	Social Responsibility <i>Ethical Reasoning [ER], Global Learning [GL],</i>

	<i>Intercultural Knowledge [IK], Teamwork [T]</i>
5	Industry, Professional, Discipline Specific Knowledge and Skills

J. APPLIED LEARNING COMPONENT: Yes ___ **X** ___ No ___

K. TEXTS: No text book needed.

L. REFERENCES:

Bodie, Z., Kane, A., and Marcus, A., (2024). Essentials of Investments, 12e, ISBN10: 1265062005 | ISBN13: 9781265062002, McGraw Hill Higher Education

M. EQUIPMENT: Technology enhanced classroom i.e. Trading Room with computers

N. GRADING METHOD: A-F

O. SUGGESTED MEASUREMENT CRITERIA/METHODS:

- Participation
- Project
- Presentation

P. DETAILED COURSE OUTLINE:

I. INTRODUCTION

- A. An Introduction to Financial Markets, Instruments, and Trading of Securities.
- B. Mutual Funds

II. INTRODUCTION TO ACTIVE INVESTMENT MANAGEMENT

- A. Investors' Objectives and Investment Policies
- B. The Conventional Theory of Performance Evaluation
- C. The Role of Active Management in nearly Efficient Markets
- D. The Value of Active Management
 - Passive Market-Index Portfolio
 - Active Portfolio
 - Alpha Values
 - Benchmark Portfolio
 - Tracking Error

III. MACROECONOMIC AND INDUSTRY ANALYSIS

IV. PERFORMANCE MEASUREMENT WITH CHANGING PORTFOLIO COMPOSITION

V. PERFORMANCE ATTRIBUTION PROCEDURES

- Time-Weighted Average
- Dollar-Weighted Rate of Return
- Comparison Universe
- Sharpe's Ratio
- Treynor's Measure
- Jensen's Alpha

- Information Ratio

Q. **LABRORATORY OUTLINE:** None