

Fundamentals of Investing

Credits:	3 (3/0/0)
Description:	This course is an introduction to the world of investments including various types of investment vehicles, techniques and strategies. Study includes the investment environment, role and scope of investments, measuring risk and return, and types of investment markets and transactions. Traditional short- and long-term investment instruments such as common and preferred stocks, bonds, government issues, convertible investments and mutual funds are analyzed. Higher-risk and more complex investments such as options, futures, real estate, precious metals and artwork are reviewed. Tax implications of the various investments are studied. Lastly, portfolio management is analyzed, including techniques and strategies.
Prerequisites:	None
Corequisites:	None
Competencies:	<ol style="list-style-type: none"> 1. Demonstrate knowledge of financial markets including stocks, bonds, mutual funds and alternative investments. 2. Demonstrate the knowledge to build and manage a diversified investment portfolio for each of life's stages. 3. Demonstrate knowledge of investment risk and allocate investments into stock and bond portfolios in accordance with a person's risk preferences. 4. Value assets such as stocks and bonds. 5. Track, understand and critically evaluate investment advice from brokers and the financial press. 6. Demonstrate understanding of the importance of establishing investor preferences. 7. Demonstrate knowledge of the basic principles of portfolio construction. 8. Distinguish between active and passive portfolio strategies and styles. 9. Differentiate between equity and income management investments.
MnTC goal areas:	None