

College of San Mateo
Official Course Outline

1. **COURSE ID:** ACTG 118 **TITLE:** Personal Investing
Units: 3.0 units **Hours/Semester:** 48.0-54.0 Lecture hours; and 96.0-108.0 Homework hours
Method of Grading: Letter Grade Only
2. **COURSE DESIGNATION:**
Degree Credit
Transfer credit: CSU
3. **COURSE DESCRIPTIONS:**
Catalog Description:
This course provides an overview of personal investing. Students will learn how to make informed decisions about investing in common stocks, fixed-income securities (bonds), mutual funds, and exchange-traded funds (ETFs). Other topics include measuring risk and return, modern portfolio concepts, market efficiency, behavioral finance, and managing a portfolio.
4. **STUDENT LEARNING OUTCOME(S) (SLO'S):**
Upon successful completion of this course, a student will meet the following outcomes:
 1. Discuss the terminology, concepts, principles, and ethics used in personal investing.
 2. Using the proper formats, perform the calculations and explain the steps to solve personal investing problems.
5. **SPECIFIC INSTRUCTIONAL OBJECTIVES:**
Upon successful completion of this course, a student will be able to:
 1. Define commonly used terminology
 2. Develop a comprehensive plan for personal investing which includes common stocks, fixed-income securities (bonds), mutual funds, and exchange-traded funds (ETFs)
 3. Understand personal investing concepts including risk and return, modern portfolio concepts, market efficiency, behavioral finance, and managing a portfolio
 4. Identify and analyze ethical standards issued by professional organizations
6. **COURSE CONTENT:**
Lecture Content:
PART I: PREPARING TO INVEST
 1. The Investment Environment
 2. Securities Markets and Transactions
 3. Investment Information and Securities TransactionsPART II: IMPORTANT CONCEPTUAL TOOLS
 4. Return and Risk
 - 4A. The Time Value of Money
 5. Modern Portfolio ConceptsPART III: INVESTING IN COMMON STOCKS
 6. Common Stocks
 7. Analyzing Common Stocks
 8. Stock Valuation
 9. Market Efficiency and Behavioral FinancePART IV: INVESTING IN FIXED-INCOME SECURITIES
 10. Fixed-Income Securities
 11. Bond ValuationPART V: PORTFOLIO MANAGEMENT
 12. Mutual Funds and Exchange-Traded Funds
 13. Managing Your Own PortfolioPART VI: DERIVATIVE SECURITIES
 14. Options: Puts and Calls
 15. Futures Markets and Securities
7. **REPRESENTATIVE METHODS OF INSTRUCTION:**

Typical methods of instruction may include:

- A. Lecture
- B. Activity
- C. Discussion
- D. Other (Specify): In on-campus sections the methods of instruction may include lectures, classroom discussion, and group problem solving. In online sections the methods of instructions may include online lectures and online discussion. A hybrid class may include a combination of methods of instructions used in on-campus and online sections. The lecture content will include personal investing theory and practice. The discussion content and group problem solving content will include application of personal investing principles and problem solving techniques. Weekly readings on personal investing theory, practice, and problem solving techniques may be included in on-campus, online, and hybrid sections.

8. REPRESENTATIVE ASSIGNMENTS

Representative assignments in this course may include, but are not limited to the following:

Writing Assignments:

Weekly written homework assignments on personal investing theory, practice, and problem solving techniques. Preparation of a comprehensive personal investing plan including common stocks, fixed-income securities (bonds), mutual funds, and exchange-traded funds (ETFs). The personal investing plan will include analysis of risk and return, and applications of the concepts of modern portfolio concepts, market efficiency, behavioral finance, and managing a portfolio. Testing will be in the form of narrative analysis of issues in personal investing and numerical questions and answers using a publisher provided online testing system.

Reading Assignments:

Weekly readings on personal investing theory, practice, and problem solving techniques. Readings will be from the text, publisher provided support materials, instructor supplied reviews of the chapter content, and topical news articles.

Other Outside Assignments:

Weekly homework using publisher provided software assignments. Research on and preparation of a complete personal investing plan. Participation in weekly online forums.

9. REPRESENTATIVE METHODS OF EVALUATION

Representative methods of evaluation may include:

- A. Class Participation
- B. Class Performance
- C. Exams/Tests
- D. Homework
- E. Projects
- F. Quizzes

10. REPRESENTATIVE TEXT(S):

Possible textbooks include:

- A. Smart, Zutter. *Fundamentals of Investing*, 14 ed. Pearson, 2019

Origination Date: March 2022

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Course Originator: Rosemary Nurre