

Investments (Master)

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Content	Skills	Learning Targets	Assessment	Resources & Technology
<p>CEQ WHAT IS INVESTING?</p> <p><i>Preparing to invest, Unit 1</i> <i>UEQ</i></p> <p><i>Investments and the investment process</i> <i>Types of Investments</i> <i>Making your investment plan</i> <i>Meeting Liquidity needs with short-term investments</i> <i>Careers in Finance</i></p>	<p>The Investment Environment</p> <p>Understand the meaning of the term investment and list the attributes that distinguish one investment from another. Describe the investment process and the types of investors. Discuss the principal types of investments Describe the purpose and content of an investment policy statement, review fundamental tax considerations, and discussing investing over the life cycle. Describe the most common types of short term investments.</p>	<p>Preparing to invest, Unit 1</p> <p>LT1. Understand the meaning of the term investment and list the attributes that distinguish one investment from another. LT2. Describe the investment process and the types of investors. LT3. Discuss the principal types of investments LT4. Describe the purpose and content of an investment policy statement, review fundamental tax considerations, and discussing investing over the life cycle.</p>	<p>Summative assessment on unit</p>	<p>Resources: Fundamentals of Investing, Pearson Pearson MyLab Financial Calculator (Online) Stock Market Game</p>

	<p>Describe some of the main careers available to people with financial expertise and the role investments play in each.</p>	<p>LT5. Describe the most common types of short term investments. LT6. Describe some of the main careers available to people with financial expertise and the role investments play in each.</p>		
<p>Securities Markets and Transactions <i>UEQ</i></p>	<p>Identify the basic types of securities markets and describe their characteristics Explain the initial public offering process Describe broker markets and dealer markets Review the key aspects of the globalization of securities markets and discuss the importance of international markets. Explain long purchases, margin transactions, and short sales.</p>	<p>LT1. Identify the basic types of securities markets and describe their characteristics LT2. Explain the initial public offering process LT3. Describe broker markets and dealer markets LT4. Review the key aspects of the globalization of securities markets and discuss the importance of international markets. LT5. Explain long purchases, margin transactions, and short sales.</p>	<p>Students will be assigned a sector of our economy and work in groups to make investment recommendations in their sector</p> <p>Buy and sell securities by playing the Stock Market Game as a group</p>	
<p>Investment Information and Securities Transactions</p>	<p>Discuss the growth in online investing and the pros and cons of using the</p>		<p>Summative assessment on unit</p>	

<p><i>Important Conceptual Tools, unit 2</i> <i>UEQ</i></p> <p>Return and Risk and The Time Value of Money <i>UEQ</i></p>	<p>Internet as an Investment tool. Identify the major types and sources of investment information. Explain the key aspects of the commonly cited stock and bond averages and indexes. Describe the basic types of orders, transaction costs, and the legal aspects of investor protection.</p> <p>Review the concept of return, its components, the forces that affect the level of return, and historical returns. Discuss the role of the time value of money in measuring return and defining a satisfactory investment Describe real, risk-free, and required returns and the calculation and application of holding period return</p>	<p>LT1. Discuss the growth in online investing and the pros and cons of using the Internet as an Investment tool. LT2. Identify the major types and sources of investment information. LT3. Explain the key aspects of the commonly cited stock and bond averages and indexes. LT4. Describe the basic types of orders, transaction costs, and the legal aspects of investor protection.</p> <p>LT1. Review the concept of return, its components, the forces that affect the level of return, and historical returns. LT2. Discuss the role of the time value of money in measuring return and defining a satisfactory investment LT3. Describe real, risk-free, and required returns and the</p>	<p>Summative assessment on unit, including assessment using financial calculator</p>	
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<p>Portfolio Management <i>UEQ</i></p>	<p>Explain the concept and the calculation of an internal rate of return and how to find growth rates. Discuss the key sources of risk that might affect potential investments Understand the risk of a single, risk assessment, and the steps that combine return and risk.</p> <p>Mutual Funds Describe the basic features of mutual funds and what they offer for investments Distinguish between open and closed-end funds, and other types of professionally managed funds, including loads, fees and charges Discuss the different types of funds available Describe the investment process for selecting a mutual fund</p>	<p>calculation and application of holding period return LT4. Explain the concept and the calculation of an internal rate of return and how to find growth rates. LT5. Discuss the key sources of risk that might affect potential investments LT6. Understand the risk of a single, risk assessment, and the steps that combine return and risk.</p> <p>LT1. Describe the basic features of mutual funds and what they offer for investments LT2. Distinguish between open and closed-end funds, and other types of professionally managed funds, including loads, fees and charges LT3. Discuss the different types of funds available</p>	<p>Students will be assigned a different sector of our economy and work in groups to make investment recommendations in their sector and if they would make changes to previous groups recommendations</p>	
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	<p>Modern Portfolio Concepts Understand portfolio objectives and the procedures used to calculate portfolio return Describe the components of risk and the use of beta to measure risk Explain the capital asset pricing model (CAPM) conceptually, mathematically, and graphically. Review the traditional and modern approaches to portfolio management.</p> <p>Portfolio Management Mutual Fund Concept Type of Funds Investing in Mutual Funds</p> <p>Explain how to use an asset allocation scheme to construct a portfolio consistent with investor objectives.</p>	<p>LT4. Describe the investment process for selecting a mutual fund</p> <p>LT1. Understand portfolio objectives and the procedures used to calculate portfolio return LT2. Describe the components of risk and the use of beta to measure risk LT3. Explain the capital asset pricing model (CAPM) conceptually, mathematically, and graphically. LT4. Review the traditional and modern approaches to portfolio management</p> <p>Portfolio Management</p>	<p>Summative assessment on unit</p> <p>Summative assessment on unit</p>	
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<p><i>Investing in Common Stocks, Unit 3</i></p>	<p>Discuss the data and indexes needed to measure and compare investment performance. Understand the techniques used to measure income, capital gains, and total portfolio return. Use the Sharpe, Treynor, and Jensen measures to compare a portfolio's return with risk-adjusted, market adjusted rate of return, and discuss portfolio revision Describe the role and logic of dollar cost averaging constant-dollar plans, constant-ratio plans, and variable - ratio plans. Explain the role of limit and stop-loss orders in investment timing, warehousing liquidity, and timing investment sales</p> <p>Common Stocks Explain the investment appeal of common stocks and why individuals like to invest in them</p>	<p>LT1. Explain how to use an asset allocation scheme to construct a portfolio consistent with investor objectives. LT2. Discuss the data and indexes needed to measure and compare investment performance. LT3. Understand the techniques used to measure income, capital gains, and total portfolio return. LT4. Use the Sharpe, Treynor, and Jensen measures to compare a portfolio's return with risk-adjusted, market adjusted rate of return, and discuss portfolio revision LT5. Describe the role and logic of dollar cost averaging constant-dollar plans, constant-ratio plans, and variable - ratio plans. LT6. Explain the role of limit and stop-loss orders in investment timing, warehousing liquidity, and timing investment sales</p>	<p>Summative assessment on unit</p>	
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<p>Stock Valuation</p>	<p>Describe stock returns from a historical perspective and understand how current returns measure up to historical standards of performance Discuss the basic features of common stocks, including issue characteristics, stock quotations, and transaction costs Understand the different kinds of common stock values Discuss common stock dividends, types of dividends, and dividend reinvestment plans</p> <p>Stock Valuation Explain the role that a company’s future plays in the stock valuation process Discuss the concepts of intrinsic value and required rates of return, and note how they are used Determine the underlying value of stock using valuation models</p>	<p>LT1. Explain the investment appeal of common stocks and why individuals like to invest in them LT2. Describe stock returns from a historical perspective and understand how current returns measure up to historical standards of performance LT3. Discuss the basic features of common stocks, including issue characteristics, stock quotations, and transaction costs LT4. Understand the different kinds of common stock values LT5. Discuss common stock dividends, types of dividends, and dividend reinvestment plans</p> <p>LT1. Explain the role that a company’s future plays in the stock valuation process LT2. Discuss the concepts of intrinsic value and required rates of return, and note how they are used</p>	<p>Summative assessment on unit</p>	
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<p>Bond Valuation</p>	<p>Bond Valuation Explain the behavior of market interest rates and identify the forces that cause interest rates to change Describe the term structure of interest rates and note how investors can use yield curves Understand how investors value bonds in the marketplace Discuss various bond investment strategies and the different ways investors can use these securities</p>	<p>LT3. Determine the underlying value of stock using valuation models</p> <p>LT1. Explain the behavior of market interest rates and identify the forces that cause interest rates to change LT2. Describe the term structure of interest rates and note how investors can use yield curves LT3. Understand how investors value bonds in the marketplace LT4. Discuss various bond investment strategies and the different ways investors can use these securities</p>	<p>Summative assessment on unit</p>	
<p>Futures Markets</p>	<p>Futures Market Describe the essential features of a futures contract and explain how the futures market operates Explain the role that hedgers and speculators play in the futures market and how profits are made and lost</p>	<p>LT1. Describe the essential features of a futures contract and explain how the futures market operates</p>	<p>Summative assessment on unit</p>	

	Describe the commodities segment of the futures market and basic characteristics of this market	LT2. Explain the role that hedgers and speculators play in the futures market and how profits are made and lost LT3. Describe the commodities segment of the futures market and basic characteristics of this market		
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