

SYLLABUS

Securities and Investments

Instructor: Laura A. Maldonado

Room: B201

Phone: 956-271-1600 ext. 4176

Email: Use the contact me on the school website



TEXAS
BUSINESS
PROFESSIONALS
of AMERICA
Sharyland Pioneer High School



Course Description:

This course introduces the basic knowledge of investments and the securities markets by the end of the school year. Become familiar with the theories presented as well as practical applications. Gain ability to evaluate different investment vehicles, recognizing the risks inherent in each and weighing them appropriately against the potential return. Emphasis is placed on the Securities markets and the investment environment; return, risk and modern portfolio concepts; stocks, bonds and valuation techniques; mutual funds and portfolio management; derivatives (options), Bank investments, FDIC, SEC. Embedded in this course, are student competition concepts that are used to encourage students to join Business Professionals of America a Career and Technology Student Organization to prepare for student competition.

Course Outcomes:

The objectives of this offering are to:

- Distinguish among the major assets that trade in money and capital markets;
- Calculate the profit or loss and rates of return on an investment in stocks, bonds, investment companies, options and futures contracts;
- Describe how firms issues securities to the public;
- Compare the mechanics and investment implications of buying in margin and short-selling;
- Cite advantages and disadvantages of investing with an investment company rather than buying securities directly;
- Contrast open-end and closed -end funds, unit investment trusts, hedge funds and exchange traded funds;
- Understand differences in investment styles;
- Understand the importance of portfolio diversification;
- Calculate the composition of the optimal risky portfolio;
- Understand the concept of efficient markets;
- Understand and use various technical indicators;
- Assess the growth prospects of a firm, and relate growth opportunities to the P/E ratio;
- Value a firm using free cash flow models;
- Understand and develop an investment policy statement for a hypothetical client;
- Understand various investor attitudes toward risk and how these attitudes affect asset allocation and security selection decisions.

Text/Materials/Web:

Curriculum: iCev

Handouts: Additional handouts may be required. Instructor will provide information on obtaining this material.

Other Online Sources: BPA Workplace Skills Assessment Program Book

Web: The Stock Market Game.com

Web: How the Market Works?.com

Teaching Methods:

1. Lectures: Important material from the text and outside sources will be covered in class. Students should plan to take careful notes as not all material can be found in the texts or readings. Discussion is encouraged as is student-procured outside material relevant to topics being covered.
2. Assignments: End of chapter activities and online activities will be assigned weekly to reinforce material in the text. These assignments may require the application of various software packages.

3. Quizzes: Occasional unannounced quizzes will be given to help ensure students keep up with assigned material.
4. Exams: Exams will be given as a major grade after every unit.
5. Projects: Students will be required to complete group and individual projects.
6. Participation: Student participation will be graded.

<u>Assignment</u>	<u>Semester Average:</u>	<u>Weight</u>
Daily Work Warm-up Participation Quizzes Dress for Success**	—————▶	40%
Tests Projects Presentations	—————▶	60%

Course Policies:

Missed Classes: The student is responsible for obtaining material distributed on class days when he/she was absent. This can be done through contacting a classmate who was present or by contacting the instructor during his conference period in person or email.

Assignments: All assignments are due at the beginning of class on the date due. Late submission of assignments will be assessed a penalty.

Academic Dishonesty: Plagiarism and cheating are serious offenses and may be punished by failure on exam, paper or project; failure in course. For this class, it is permissible to assist classmates in general discussions of computing techniques. General advice and interaction are encouraged. Each person, however, must develop his or her own solutions to the assigned projects, assignments, and tasks. In other words, students may not "work together" on graded assignments.

Posting of Grades: All grades will be posted on SKYWARD. Students and Parents are responsible for obtaining access to SKYWARD and checking it on a daily basis.

Tutoring: Tutoring will be available on Mondays and Wednesdays from 4-4:30pm and upon request.

Mobile Devices Policy: All student devices will only be allowed in class for an educational purpose. Otherwise, devices should be in the charging station, powered off, or placed on silent, and stored out of sight. The teacher will notify you when you will use any mobile device for class work.

Disclaimer: It is the policy of Sharyland ISD not to discriminate on the basis of race, color, national origin, sex or handicap in its vocational programs, services or activities as required by Title VI of the Civil Rights Act of 1964, as amended; Title IX of the Education Amendments of 1972; and Section 504 of the Rehabilitation Act of 1973, as amended.

Es norma del distrito de Sharyland ISD no discriminar por motivos de raza, color, origen nacional, sexo o impedimento, en sus programas, servicios o actividades vocacionales, tal como lo requiere el Título VI de la Ley de Deprechos Civiles de 1964, según enmienda; el Título IX de las Emmiendas en la Educación de 1972, y

la Sección 504 de la Ley de Rehabilitación de 1973, según enmienda.

Student Name (Print) _____ *Student Signature* _____

Parent Signature _____

Week #	Week of	PR	Unit #	Unit/Concept Name	Notes
1	Aug. 21-25	PR1	1	Routines and Procedures Syllabus Classroom Rules and Procedures All About Me Dress for Success BPA Expectations BPA Goals List BOY	DFS Presentations
2	Aug. 28-Sep. 1	PR1	1	Unit 1 Professional Standards REVIEW BPA 2023-2024 CALENDAR OF EVENTS	WAC iCev Mobile QR Code Assessment
3	Sep. 4-8	PR1	1	Unit 1: Professional Standards REVIEW BPA 2023-2024 CALENDAR OF EVENTS The Stock Market Game Challenge Begins September 5, 2023 - April 19, 2024	TBA Meet the Teacher WAC iCev Mobile QR Code Assessment
4	Sept. 11- 15	PR2	1	Unit 1: Professional Standards 2023-2024 BPA WASP REVIEW FLC EVENT PREP	WAC iCev Mobile QR Code Assessment
5	Sept. 18-22	PR2	1	Unit 1: Professional Standards 2023-2024 BPA MEMBER APPLICATIONS DUE Unit 1: EXAM FLC EVENT PREP	WAC iCev Mobile QR Code Assessment
6	Sept. 25-29	PR2	1	Unit 2: Laws, Regulations, and Ethics FLC EVENT PREP	WAC iCev Mobile QR Code Assessment

7	Oct. 2-6	PR3	1	Unit 2: Laws, Regulations, and Ethics FLC EVENT PREP	WAC iCev Mobile QR Code Assessment
---	----------	-----	---	--	--

Week #	Week of	PR	Unit #	Unit/Concept Name	Notes
8	Oct. 9-13	PR3	1	Unit 2: Laws, Regulations, and Ethics FLC EVENT PREP	WAC iCev Mobile QR Code Assessment
9	Oct. 16-20	PR3	1	Unit 2: Laws, Regulations, and Ethics Unit 2: EXAM Fall Leadership Conference 2023 Saturday October 21st, 2023	WAC iCev Mobile QR Code Assessment
10	Oct. 23-27	PR4	1	Unit 3: Investment Analysis and Selection Processes BPA RLC Competitive Events Prep	WAC iCev Mobile QR Code Assessment
11	Oct. 30-Nov. 3	PR4	1	Unit 3: Investment Analysis and Selection Processes BPA RLC Competitive Events Prep	WAC iCev Mobile QR Code Assessment
12	Nov. 6-Nov. 10	PR4	2	Unit 3: Investment Analysis and Selection Processes BPA RLC Competitive Events Prep	WAC iCev Mobile QR Code Assessment
13	Nov. 13-17	PR5	2	Unit 3: Investment Analysis and Selection Processes Unit 3: EXAM	WAC iCev Mobile QR Code Assessment

				BPA RLC Competitive Events Prep	
--	--	--	--	--	--

Week #	Week of	PR	Unit #	Unit/Concept Name	Notes
	Nov. 20-24			Thanksgiving Break	
15	Nov. 27-Dec. 1	PR5	2	Unit 4: Values and Calculations BPA RLC Competitive Events Prep	WAC iCev Mobile QR Code Assessment
16	Dec. 4-8	PR6	2	Unit 4: Values and Calculations BPA RLC Competitive Events Prep	WAC iCev Mobile QR Code Assessment
17	Dec. 11-15	PR6	2	Unit 4: Values and Calculations BPA RLC Competitive Events Prep SEMESTER EXAM Unit 4: EXAM	WAC iCev Mobile QR Code Assessment
18	Dec. 18-22	PR6	2	BPA RLC Competitive Events Prep SEMESTER EXAM	WAC iCev Mobile QR Code Assessment
	Dec. 23-Jan. 7			Winter Break BPA REGIONAL LEADERSHIP CONFERENCE (JAN. 4 - 5,2023)	

Week #	Week of	PR	Unit #	Unit/Concept Name	Notes
19	Jan. 8-12	PR 7	3	Unit 5: Operational Activities and Commissions	WAC iCev Mobile QR Code Assessment Team Presentations

20	Jan. 15-19	PR7	3	Unit 5: Operational Activities and Commissions	WAC iCev Mobile QR Code Assessment
21	Jan. 22 -26	PR 7	3	Unit 5: Operational Activities and Commissions VITA PROGRAM CERTIFICATION TRAINING 1-3 TBA BPA SLC PREP	WAC iCev Mobile QR Code Assessment
22	Jan. 29-Feb. 2	PR 8	3	Unit 5: Operational Activities and Commissions BPA SLC PREP	WAC iCev Mobile QR Code Assessment
23	Feb. 5-9	PR 8	3	Unit 5: Operational Activities and Commissions Unit 5: EXAM BPA SLC PREP	WAC iCev Mobile QR Code Assessment
24	Feb. 12-16	PR 8	3	Unit 6: Investment Environments and Economic Relationships BPA SLC PREP	WAC iCev Mobile QR Code

Week #	Week of	PR	Unit #	Unit/Concept Name	Notes
25	Feb. 19-23	PR 9	3	Unit 6: Investment Environments and Economic Relationships BPA SLC PRESENTATIONS	WAC iCev Mobile QR Code Assessment
26	Feb. 26-Mar. 1	PR 9	3	Unit 6: Investment Environments and Economic Relationships STATE LEADERSHIP CONFERENCE (FEB. 28 – MAR 2. 2024)	WAC iCev Mobile QR Code Assessment
27	Mar. 4-8	PR 9	3	Unit 6: Investment Environments and Economic Relationships Unit 6: EXAM COMMUNITY SERVICE PROJECT	WAC iCev Mobile QR Code Assessment
	Mar. 11-15			Spring Break	
28	Mar. 25-29	PR 10	3-4	Unit 7: Demonstrate Your Understanding of Securities and Investments BPA NLC PREP	WAC iCev Mobile QR Code Assessment

Week #	Week of	PR	Unit #	Unit/Concept Name	Notes
29	Apr. 1-5	PR 10	4	Unit 7: Demonstrate Your Understanding of Securities and Investments BPA NLC PREP	WAC iCev Mobile QR Code Assessment
30	Apr. 8-12	PR 10	4	Unit 7: Demonstrate Your Understanding of Securities and Investments BPA NLC PREP	WAC iCev Mobile QR Code Assessment
31	Apr. 15-19	PR 11	4	Unit 7: Demonstrate Your Understanding of Securities and Investments BPA NLC PREP The Stock Market Game Challenge Ends April 19, 2024	WAC iCev Mobile QR Code Assessment Team Presentations
32	Apr. 22-26	PR 11	4-5	Unit 7: Demonstrate Your Understanding of Securities and Investments Unit 7: EXAM BPA NLC PREP	WAC iCev Mobile QR Code Assessment

Week #	Week of	PR	Unit #	Unit/Concept Name	Notes
33	Apr. 29-May 3	PR 11	5	Unit 8: Certification and Licensing BPA NLC PREP	WAC iCev Mobile QR Code Assessment
34	May 6-10	PR 12	5	Unit 8: Certification and Licensing BPA NATIONAL LEADERSHIP CONFERENCE (MAY. 10-14, 2024)	WAC iCev Mobile QR Code Assessment
35	May 13-17	PR 12	5-6	Unit 8: Certification and Licensing	WAC iCev Mobile QR Code Assessment

Week #	Week of	PR	Unit #	Unit/Concept Name	Notes
36	May 20-24	PR 12	6	SEMESTER EXAM	WAC iCev Mobile QR Code Assessment
37	May 27-30	PR12	6	BPA 2023-2024 BPA Goals List Reflection EOY	WAC iCev Mobile QR Code Assessment

Notice: This timeline is tentative and subject to changes.