

**Note:**

**Course content may be changed, term to term, without notice. The information below is provided as a guide for course selection and is not binding in any form, and should not be used to purchase course materials.**

## ***COURSE SYLLABUS***

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### **BUSI 538**

#### **INVESTMENTS & DERIVATIVES**

#### **COURSE DESCRIPTION**

This course explores the framework from which a company makes investment decisions, provides a foundation for the study of derivative products, and how companies may effectively use investments and derivatives to make wise financial decisions.

#### **RATIONALE**

Students earning a graduate degree specializing in finance should understand the fundamentals of investments and options. This course introduces students to the elements of investments, portfolio theory, debt and equity instruments, and derivative markets essential for the investing.

#### **I. PREREQUISITE**

For information regarding prerequisites for this course, please refer to the [Academic Course Catalog](#).

#### **II. REQUIRED RESOURCE PURCHASE**

Click on the following link to view the required resource(s) for the term in which you are registered: <http://bookstore.mbsdirect.net/liberty.htm>

#### **III. ADDITIONAL MATERIALS FOR LEARNING**

- A. Computer with basic audio/video output equipment
- B. Internet access (broadband recommended)
- C. Microsoft Word and Microsoft Excel

#### **IV. MEASURABLE LEARNING OUTCOMES**

Upon successful completion of this course, the student will be able to:

- A. Contrast open-end mutual funds with closed-end funds, unit investment trusts, hedge funds, and exchange-traded funds.
- B. Identify reasons why technical analysis may be profitable.
- C. Calculate and interpret performance measures such as economic value added and rates of return on assets, capital, and equity.
- D. Formulate strategies for various investment options to modify portfolio risk-return attributes and to assess portfolio strategy.
- E. Integrate biblical principles within the field of investments.

- F. Develop an investment policy statement consistent with investment objectives and constraints.

**V. COURSE REQUIREMENTS AND ASSIGNMENTS**

- A. Textbook readings and lecture presentations/notes
- B. Course Requirements Checklist

After reading the Course Syllabus and [Student Expectations](#), the student will complete the related checklist found in Module/Week 1.

- C. Discussion Board Forums (2)

The student is required to provide a thread in response to the provided prompt for each forum. The original thread needs to be 500–750 words, include at least 2 references, include biblical scripture integrations, and demonstrate course-related knowledge from the text.

In addition to the thread, the student is required to reply to 2 other classmates' main discussion board threads. Each reply thread needs to be 450–600 words, include 2 references, and 1 biblical integration.

The first discussion board main post will be due at the end of Module/Week 3, with reply posts due at the end of Module/Week 4.

Discussion Board 1 Topic:

Review the “Parable of the Talents” in Matthew 25: 14–30. Discuss (1.) money market instruments, (2.) fixed-income/bond instruments, (3.) equity investments, (4.) mutual funds, and (5.) derivative/option investments relative to the Scripture. How does risk mitigation/avoidance and risk tolerance relate to return strategies/expectations for each of the five types of investments?

The second discussion board main post will be due at the end of week-5, with reply posts due at the end of Module/Week 6.

Discussion Board 2 Topic:

With the exclusion of Matthew 25: 14–30, please choose 4 Scriptures that relate to the topic of investing, budgeting, and/or wealth management. Integrate the scriptures with the material from the text and from online resources to demonstrate how the Bible is vital to the principles of investments and/or your own investment strategies for retirement. Please make sure that your own original analysis of each scripture is provided.

- D. Connect Homework (8)

The student will be assigned homework and exams to complete per chapter in Connect.

In order to gain access to Connect, the student may either purchase the textbook listed in the Course Syllabus with the access code or purchase the access code separately via the bookstore or the Connect website. The instructor will provide

the student with the URL needed for registering during the week before the course begins, along with specific instructions for registering.

- E. Investment Project: Chapter 22 Implementation and Application: Due Date of Module/Week 7.

Please discuss and analyze your own investment management process and develop your own investment policy statement (IPS) with regard to wealth creation and retirement planning. Discuss investment objectives and constraints in the development of your IPS. Comprehensively integrate the topics learned throughout the course.

Please provide a Kaltura Video within the course drop-box, and present a PowerPoint presentation with a minimum of 10 slides. The presentation does not have to be in a current APA format, and you may utilize the first person since you are commenting on your analysis of the creation of your own IPS. A presentation of a 10-minute minimum (with a limit of 15 minutes) is required in Kaltura.

## VI. COURSE GRADING AND POLICIES

### A. Points

Course Requirements Checklist:	10
Discussion Board Threads (2 at 50 pts each)	100
Discussion Board Replies (2 at 30 pts each)	60
Connect Homework (16 at 20 pts each)	320
Connect Quizzes (16 at 20 pts each)	320
Investment Project:	200
• Chapter 22 Implementation & Application:	
• 100 Points for the Kaltura Video,	
• 100 Points for the PowerPoint presentation.	

**Total** 1010

### B. Scale

A = 940–1010    A- = 920–939    B+ = 900–919    B = 860–899    B- = 840–859  
 C+ = 820–839    C = 780–819    C- = 760–779    F = 759 and below

### C. Late Assignment Policy

If the student is unable to complete an assignment on time, then he or she must contact the instructor immediately by email.

Assignments that are submitted after the due date without prior approval from the instructor will receive the following deductions:

1. Late assignments submitted within one week of the due date will receive a 10% deduction.
2. Assignments submitted more than one week late will receive a 20% deduction.

3. Assignments submitted two weeks late or after the final date of the course will not be accepted.
4. Late Discussion Board threads or replies will not be accepted.

Special circumstances (e.g. death in the family, personal health issues) will be reviewed by the instructor on a case-by-case basis.

D. Quizzes/Tests/Exams

For timed quizzes/tests/exams, the student is required to complete the quiz/test/exam within the assigned time. For the student who exceeds this time limit, a penalty of 1 point will be deducted for each minute, or part thereof, he/she exceeds the assigned time limit.

E. Disability Assistance

Students with a documented disability may contact Liberty University Online's Office of Disability Academic Support (ODAS) at [LUOODAS@liberty.edu](mailto:LUOODAS@liberty.edu) to make arrangements for academic accommodations. Further information can be found at [www.liberty.edu/disabilitysupport](http://www.liberty.edu/disabilitysupport).

## ***COURSE SCHEDULE***

### **BUSI 538**

Textbook: Bodie et al., *Essentials of Investments* (2017).

<b>MODULE/ WEEK</b>	<b>READING &amp; STUDY</b>	<b>ASSIGNMENTS</b>	<b>POINTS</b>
<b>1</b>	Bodie et al.: chs. 1–2	Course Requirements Checklist Class Introductions Chapter 1 Homework Chapter 1 Quiz Chapter 2 Homework Chapter 2 Quiz	10 0 20 20 20 20
<b>2</b>	Bodie et al.: chs. 3–4	Chapter 3 Homework Chapter 3 Quiz Chapter 4 Homework Chapter 4 Quiz	20 20 20 20
<b>3</b>	Bodie et al.: chs. 6–7	Chapter 6 Homework Chapter 6 Quiz Chapter 7 Homework Chapter 7 Quiz Discussion Board 1: Main Post	20 20 20 20 50
<b>4</b>	Bodie et al.: chs. 8–9	Chapter 8 Homework Chapter 8 Quiz Chapter 9 Homework Chapter 9 Quiz Discussion Board 2: Reply Posts	20 20 20 20 30
<b>5</b>	Bodie et al.: chs. 10–11	Chapter 10 Homework Chapter 10 Quiz Chapter 11 Homework Chapter 11 Quiz Discussion Board 2: Main Post	20 20 20 20 50
<b>6</b>	Bodie et al.: chs. 13–14	Chapter 13 Homework Chapter 13 Quiz Chapter 14 Homework Chapter 14 Quiz Discussion Board 2: Reply Posts	20 20 20 20 30

<b>MODULE/ WEEK</b>	<b>READING &amp; STUDY</b>	<b>ASSIGNMENTS</b>	<b>POINTS</b>
<b>7</b>	Bodie et al.: chs. 15–16	Chapter 15 Homework Chapter 15 Quiz Chapter 16 Homework Chapter 16 Quiz Investment Project: Kaltura Video Investment Project: PPT Presentation	20 20 20 20 100 100
<b>8</b>	Bodie et al.: chs. 18–19	Chapter 18 Homework Chapter 18 Quiz Chapter 19 Homework Chapter 19 Quiz	20 20 20 20
<b>TOTAL</b>			<b>1010</b>

DB = Discussion Board

**NOTE:** Module/Week 1 begins on Monday morning at 12:00 a.m. (ET) and ends on Friday night at 11:59 p.m. (ET). Module/Weeks 2-8 will begin on Saturday morning at 12:00 a.m. (ET) and end on Friday night at 11:59 p.m. (ET).