

Brief Course Outline

Course Title: Investment Management

Course Number and Section

MOS

3316B 550

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Disclaimer: Information in the brief course outline is subject to change. The syllabus posted on OWL Brightspace is the official and authoritative source of information for the course.

Course Description:

This course examines the major theories of investment finance and the pricing bonds, stocks and options. Portfolio construction using passive and active management strategies will also be discussed. The course will appeal to anyone considering a career as a financial analyst, portfolio manager or in wealth management. It will also aid in preparing for the preliminary exams of various professional designations.

Learning Outcomes: one outcome per entry

Understand the role of financial assets, markets, and their key participants
Analyze the features and valuation of equities, bonds, options, and other derivatives
Evaluate the trade-off between risk and return in portfolio construction
Examine market efficiency theories and their implications for investment decisions

Textbooks and Course Materials:

Recommended textbook: Bodie, Z., Kane, A., Marcus, A. J., Switzer, L., Boyko, D., Panasian, C., & Stapleton, M. (2025). Investments (11th Canadian ed.). McGraw Hill. The earlier 10th edition is sufficient as well.

Methods of Evaluation: one assignment per entry

Assignment	Due Date mm/dd/yy	Weight - %
First Term Test		30
Second Term Test		30
Group Project		20
Class Participation		5
Bloomberg Certificate		5
Assignments		10

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For Textbooks and Course Materials (below), you are required to include the cost of each textbook or other learning material.

Note whether there are any restrictions that would prevent a student from using a second-hand copy. Here is some suggested text:

- Required textbook: [author, title, edition, publisher, date]. Cost: [insert amount].
 - Or include the weblink of the textbook's publisher site that includes the cost information.
- Students need to purchase this edition. Second-hand or older editions will not be sufficient.
- OR Students are welcome to purchase second-hand or earlier editions of this textbook.
- This course has an optional field trip that costs [insert amount].
- This course has a required field component that costs [insert amount].

In solidarity with the Anishinaabe, Haudenosaunee, Lūnaapéewak, and Chonnonton peoples on whose traditional treaty and unceded territories this course is shared.