

Finance (FNCE) 249

Personal Investing (Revision 5)

Delivery Mode: Individualized Study Online [↗](#) with **eText** [↗](#)

Credits: 3

Area of Study: Applied Studies (Business & Administrative Studies)

Prerequisites: None

Precluded: None

Challenge: FNCE 249 has a Challenge for Credit option.

Faculty: [Faculty of Business](#) [↗](#)

Status: Replaced with new revision, see the [course listing](#) [↗](#)
for the current revision [✕](#)

Notes: Students registering in grouped study mode are advised that there may be some differences in the evaluation and course materials information indicated below. To obtain the most up-to-date information, contact the Faculty of Business Student Support Centre at 1-800-468-6531.



➤ Overview

Overview

The aim of this course is to help you gain the knowledge and skills to effectively manage your personal investments. You will gain an understanding of the budgeting and investment process, familiarity with investment math and terminology, and the ability to apply and assess different approaches to investing.

The first two lessons focus on foundational topics and skills. Lesson 1 covers financial planning concepts, which lay the groundwork for successful investing. Lesson 2 introduces you to investments by providing an overview of the main topics. You will then complete the first assignment, which is technical in nature. It covers basic investment concepts and terminology and introduces the time value of money math, concepts that are essential for managing an investment portfolio.

The course then takes on a more applied focus—you will learn and utilize an approach to creating and managing an investment portfolio. In a preparatory activity, you will complete a personal risk assessment and select companies to follow for later analysis. Lessons 3 through 5 provide more detailed coverage of core investment concepts. In the second assignment you will apply these concepts by completing top-down analyses of the companies you chose to follow.

Finally, Lesson 6 provides an opportunity to compare and evaluate investment philosophies and approaches. The third assignment continues the application of practical skills while also encouraging you to reflect and assess the suitability of different investment strategies in various contexts.

➤ Outline



Outline


- Lesson 1: Financial Statements, Budgeting, and Planning
- Lesson 2: Investment Basics—An Overview
- Lesson 3: Security Analysis—Stocks and Bonds
- Lesson 4: Mutual Funds and Exchange-Traded Funds
- Lesson 5: Capital Market Analysis, Risk, Inflation, and Taxes
- Lesson 6: Learning from the Masters

➤ Evaluation

Evaluation


To **receive credit** [↗](#) in FNCE 249, you must complete and submit three assignments (in order from 1 to 3). Your final grade is determined by a weighted average of the grades you receive on these activities. You must achieve a composite grade of **D (50 percent)** [↗](#) or better for the entire course. The weightings for each assignment are as follows:

Activity	Weight
Assignment 1	30%
Assignment 2/3 Preparation	5%
Assignment 2	40%
Assignment 3	25%
Total	100%



To learn more about assignments and examinations, please refer to Athabasca University's [online Calendar](#) .

Materials

Materials

Kapoor, J. R., Dlabay, L. R., Hughes, R. J., Stevenson, L., Kerst, E. J., Ahmad, A., & Fortino, J. (2018). *Personal finance*. (7th Can. ed.), Toronto, ON: McGraw-Hill Ryerson Limited. ISBN: 9781259651465  (eText)

eText

Registration in this course includes an electronic textbook. For more information on [electronic textbooks](#) , please refer to our [eText Initiative site](#) .

Other Resources

All other learning resources will be available online.

Challenge for Credit

Challenge for Credit

Overview

The Challenge for Credit process allows you to demonstrate that you have acquired a command of the general subject matter, knowledge, intellectual and/or other skills that would normally be found in a university-level course.

Full information about [Challenge for Credit](#)  can be found in the Undergraduate Calendar.

Evaluation



To **receive credit** [↗](#) for the FNCE 249 challenge registration, you must complete and achieve a grade of at least **D (50 percent)** [📄](#) on the challenge examination.

- Paper exam (3 Hours)

[📄](#) **Challenge for Credit Course Registration Form**

[➤](#) Important Links

Important Links

- > [Academic Advising](#) [↗](#)
- > [Program Planning](#) [↗](#)
- > [Request Assistance](#) [↗](#)
- > [Support Services](#) [↗](#)

Athabasca University reserves the right to amend course outlines occasionally and without notice. Courses offered by other delivery methods may vary from their individualized-study counterparts.

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Updated November 17, 2021, by Student & Academic Services

View [previous revision](#) [↗](#)

