



Finance (FNCE) 249

Personal Investing (Revision 6)

Status:

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

Delivery mode:

Individualized study online with eText

Credits:

3

Area of study:

Applied Studies (Business and Administrative Studies)

Prerequisites:

None

Precluded:

None

Challenge:

FNCE 249 has a challenge for credit option.

Faculty:

[Faculty of Business](#)

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

Overview

This course will help you gain the knowledge and skills to effectively manage your personal investments. You will examine the budgeting and investment process, become familiar with investment math and terminology, and learn to assess and apply 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, and Lesson 2 introduces you to investments. The course then takes on a more applied focus, through which you will learn and practice creating and managing an investment portfolio. Lessons 3 through 5 cover core investment concepts in more detail. Finally, Lesson 6 provides an opportunity to compare and evaluate investment philosophies and approaches.

Learning outcomes

After completing this course, you should be able to

- interpret and explain personal financial statements and the budgeting process.
- perform basic financial mathematics calculations.
- analyze and interpret industry and economic factors that affect financial markets.
- explain basic investment concepts and terminology.
- assess risk and return potential for various types of securities, including stocks and bonds.
- develop and manage a simple investment portfolio.
- contrast various investment approaches and styles.

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

To **receive credit** [↗](#) in FNCE 249, you must complete and submit three assignments (in order from 1 to 3) and the Assignment 2/3 Preparation exercise. 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

Kapoor, J. R., Dlabay, L. R., Hughes, R. J., Stevenson, L., & Kerst, E. J. (2021). *Personal finance* (8th Can. ed.). McGraw-Hill Ryerson. ISBN:

9781260890167  (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

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.

- Online exam (3 Hours)



Challenge for credit course registration form

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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View **previous revision** 
