

14-167b
 UWUCC AP- 4/21/15
 Senate App - 4/28/15

New Course Proposal Template

Steps to the approval process:

1. Complete the applicable template(s) and email them to the departmental or program curriculum committee chair.
2. The curriculum chair emails the proposal to the curriculum committee, then to the department/program faculty for a vote and finally to the department/program chair.
3. The department/program chair emails the proposal to curriculum-approval@iup.edu; this email will also serve as an electronic signature.
4. Curriculum committee staff will log the proposal, forward it to the appropriate dean's office(s) for review within 14 days and post it on the X Drive for review by all IUP faculty and administrators. Following the dean's review the proposal goes to the UWUCC/UWGC and the Senate.
5. Questions? Email curriculum-approval@iup.edu.

Contact Person:	Daniel T. Lawson	Email Address:	dlawson@iup.edu
Proposing Depart/Unit:	Finance and Legal Studies/Eberly College of Business	Phone:	610-357-9774

Course Prefix/Number	<i>See the Registrar's list of Unavailable course numbers at http://www.iup.edu/WorkArea/linkit.aspx?LinkIdentifier=id&ItemID=129323.</i> FIN 366 Student Managed Investment Portfolio 11-Performance
Dual/Cross Listed	<i>Dual Listed = Courses listed at two levels, such as undergraduate and graduate, masters and doctoral, etc. Cross Listed = Course has more than one prefix such as GEOG/RGPL 233.</i> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If yes with: NA
Number of Credits	(UG) Class Hours - 1.5 (UG) Lab Hours - NA Credits - 1.5
Prerequisite(s)	FIN 365
Corequisite(s)	<i>This means that another course must be taken in the same semester as the proposed course</i> NA
Additional Information (Check all that apply. Note: Additional documentation will be required)	<input type="checkbox"/> Liberal Studies (please also complete Template C) <input type="checkbox"/> Teacher Education (Is it Step 1 a prerequisite or is it part of the Professional Education Sequence If so please also complete Template D) <input type="checkbox"/> Distance Education (Please also complete Template E)
Course Title	Student Managed Investment Portfolio II - Performance
Recommended Class Size (optional) (provide justification)	Are you recommending a class size: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No If yes: (check one of the following reasons and provide a narrative explanation) <input checked="" type="checkbox"/> Pedagogical <input type="checkbox"/> Physical limitation of classroom <input type="checkbox"/> Accreditation body standards/recommendations <input type="checkbox"/> Other Explanation (<i>required</i>): Working closely with students who will be writing performance reports and providing feedback. Additionally, some seats should be reserved for students that have already taken the class for credit but play an integral role in the investment portfolio. This will ensure a smooth transition each year, which is important to the Foundation of IUP (provider of the funds). Moreover, some seats should be left open to allow exceptional freshman and sophomore students the opportunity to be exposed to portfolio investment early in their academic career. Thus, the recommended class size is 25.

Template A

<p>Catalog Description</p>	<p><i>Guidelines: Do not include pre/co-requisite information here. The registrar prefers a concise description of course content, beginning with an active verb.</i></p> <p>Students assess the performance of a stock portfolio managed by their peers. Performance measures focus on risk and return and include financial ratio analysis and benchmark comparisons.</p>														
<p>Student Learning Outcomes</p> <p><i>(These should be measurable, appropriate to the course level, and phrased in terms of student achievement, not instructional or content outcomes)</i></p> <p><i>If dual listed, indicate additional learning objectives for the higher level course.</i></p>	<p>Students will be able to:</p> <ol style="list-style-type: none"> 1. Assess the performance of a diversified portfolio through financial ratios such as the Sharpe and Treynor ratios and Jensen’s alpha 2. Develop an appreciation of market efficiency and learn first hand how difficult it is to outperform market returns 3. Calculate the variance and standard deviation of a stock portfolio and understand their relationship to returns of the portfolio 														
<p>Brief Course Outline:</p> <p><i>Give an outline of sufficient detail to communicate the course content to faculty across campus. It is not necessary to include specific readings, calendar, or assignments.</i></p>	<ol style="list-style-type: none"> A. Introduction, Syllabus, Guidelines B. Excel and Bloomberg Refresher/Training C. Historical Market Returns, Small Cap, Mid Cap, Large Cap, S&P 500, Dow Jones, NASDAQ D. Using Financial Ratios to Assess Performance E. Calculating Returns, Annualizing Returns, Total Returns F. Market Volatility, Variance and Standard Deviation G. Risk and Reward, Systematic and Unsystematic Risk H. Historical Market Returns, Small Cap, Mid Cap, Large Cap I. Asset Allocation versus Security Selection J. Behavioral Finance and Market Efficiency <p>Evaluation Methods:</p> <table style="width: 100%; border: none;"> <tr> <td style="padding-left: 20px;">Attendance</td> <td style="text-align: right;">10%</td> </tr> <tr> <td style="padding-left: 20px;">Sector Updates</td> <td style="text-align: right;">10%</td> </tr> <tr> <td style="padding-left: 20px;">Sector Performance Reports</td> <td style="text-align: right;">10%</td> </tr> <tr> <td style="padding-left: 20px;">Company Performance Reports</td> <td style="text-align: right;">20%</td> </tr> <tr> <td style="padding-left: 20px;">Financial Ratios Report</td> <td style="text-align: right;">20%</td> </tr> <tr> <td style="padding-left: 20px;">Portfolio Performance and Recommendation Report</td> <td style="text-align: right;">30%</td> </tr> <tr> <td></td> <td style="text-align: right; border-top: 1px solid black;">100%</td> </tr> </table>	Attendance	10%	Sector Updates	10%	Sector Performance Reports	10%	Company Performance Reports	20%	Financial Ratios Report	20%	Portfolio Performance and Recommendation Report	30%		100%
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<h3>Rationale for Proposal</h3>															
<p>Why is this course being proposed?</p>	<p>The purpose of this course is to give students hands on experience in assessing the performance of stock portfolios. Some of our finance students will end up working in the investment field and their experience in this class will be useful. This course follows the Student Managed Investment Portfolio I Valuation class and allows additional exposure required to appreciate a changing economy and market movements.</p>														
<p>How does it fit into the departmental curriculum? (Check all that apply)</p>	<table style="width: 100%; border: none;"> <tr> <td><input checked="" type="checkbox"/> Major Requirement</td> <td><input type="checkbox"/> Minor Requirement</td> <td><input type="checkbox"/> Core Requirement <i>(Interdisciplinary core – e.g Business/Education)</i></td> </tr> <tr> <td><input type="checkbox"/> Required Elective</td> <td><input type="checkbox"/> Liberal Studies</td> <td><input checked="" type="checkbox"/> Open Elective</td> </tr> <tr> <td colspan="3"><input type="checkbox"/> Other - NA</td> </tr> </table>	<input checked="" type="checkbox"/> Major Requirement	<input type="checkbox"/> Minor Requirement	<input type="checkbox"/> Core Requirement <i>(Interdisciplinary core – e.g Business/Education)</i>	<input type="checkbox"/> Required Elective	<input type="checkbox"/> Liberal Studies	<input checked="" type="checkbox"/> Open Elective	<input type="checkbox"/> Other - NA							
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<p>Is a similar class offered in other</p>	<p><input type="checkbox"/> Yes</p>														

Template A

departments?	Please provide comment: NA <input checked="" type="checkbox"/> No
Does it serve the college/university above and beyond the role it serves in the department?	<input type="checkbox"/> Yes Please provide comment: NA <input checked="" type="checkbox"/> No
Who is the target audience for the course?	<input checked="" type="checkbox"/> Course Designed for Majors (<input type="checkbox"/> Required <input checked="" type="checkbox"/> Not Required) <input checked="" type="checkbox"/> Course Designed for Minor <input checked="" type="checkbox"/> Departmental Elective <input type="checkbox"/> Restricted to Majors/Minors <input type="checkbox"/> Open to Any Student <input type="checkbox"/> Liberal Studies <input type="checkbox"/> Other - NA
Implications for other departments	<p>A. What are the implications for other departments (<i>For example: overlap of content with other disciplines, requirements for other programs</i>)? There is no overlap amongst other disciplines or programs.</p> <p>B. How have you addressed this with other department(s) involved? What was the outcome of that attempt? (Attach documents as appropriate) NA</p>
For Dean's Review	
<ul style="list-style-type: none"> • Are resources available/sufficient for this course? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA • Is the proposal congruent with college mission? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA • Has the proposer attempted to resolve potential conflicts with other academic units? <input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> NA <p>Comments: Click here to enter text.</p>	