

A Complete Guide to Investing

Course Description

This course teaches you the securities market, the various types of investment securities (stocks, bond, options, futures, tax-advantaged investments, mutual funds, etc.), and the risk-return characteristics of each. It focuses on the principles and tools of investment analysis, asset allocation, portfolio selection and management. The course tells you what are available to invest in, the features of each type of investment, the advantages and disadvantages of each investment category, including global investing, and when a particular investment type might be suitable for you.

Completion Deadline & Exam: This course, including the examination, must be completed within one year of the date of purchase. In addition, unless otherwise indicated, no correct or incorrect feedback for any exam question will be provided.

Course Level: Overview. This program is appropriate for professionals at all organizational levels.

CPE Credits: 14 (CPA)

Category: Finance

Prerequisite: None

Advanced Preparation: None

Course Learning Objectives

Chapter 1: Getting Started as an Investor

At the end of this chapter you will be able to:

1. Differentiate between the different types of investments, including fixed versus variable-income, financial versus real assets, direct versus indirect, and long-term versus short-term
2. Identify the features of stocks and bonds, and the drawbacks and benefits of each
3. Recognize key attributes of common stocks and mutual funds

Chapter 2: Financial Markets and Investment Process

At the end of this chapter you will be able to:

1. Recognize various types of securities transactions and what is involved in each type

2. Identify advantages and disadvantages of buying stock on margin and selling stock short

Chapter 3: Return and Risk

At the end of this chapter you will be able to:

1. Recognize the income and return on investments and how it is measured
2. Identify different investment risk factors and how they affect investment return

Chapter 4: Fundamental Analysis

At the end of this chapter you will be able to:

1. Identify the benefits and objectives of fundamental analysis of investments
2. Recognize key financial ratios and how they are applied financial statements

Chapter 5: Technical Analysis

At the end of this chapter you will be able to:

1. Recognize the tools of technical analysis
2. Identify the key indicators of market and stock performance and how they are used

Chapter 6: Common Stocks and Preferred Stocks

At the end of this chapter you will be able to:

1. Recognize the characteristics of common stock compared to preferred stock

Chapter 7: How Much Are You Willing to Pay for a Common Stock?

At the end of this chapter you will be able to:

1. Recognize the fundamental valuations of common stock
2. Differentiate price/earnings ratio approaches

Chapter 8: Fixed Income Securities

At the end of this chapter you will be able to:

1. Recognize the characteristics of the different types of bonds including agencies, types, bond yields, interest rates, prices and risk.

Chapter 9: Investing in Options

At the end of this chapter you will be able to:

1. Recognize the key terms and attributes for investing in options

Chapter 10: Futures Contracts

At the end of this chapter you will be able to:

1. Recognize key attributes of futures contracts and how they relate to investment decisions
2. Identify the uses of and differences between various types of financial futures.

Chapter 11: Global Investing

At the end of this chapter you will be able to:

1. Recognize the advantages and risks of global investing
2. Identify the methods of investing in international money markets

Chapter 12: Tax-Advantaged Investments

At the end of this chapter you will be able to:

1. Recognize the following: limited partnerships, real estate investment trusts (REITs), and real estate operating company (REOC)
2. Identify the advantages and disadvantages of the various types of pension funds

Chapter 13: Mutual Funds

At the end of this chapter you will be able to:

1. Recognize the attributes of mutual funds and the common services offered by mutual funds
2. Recognize the types of mutual funds, advantages of different mutual funds, and ways to invest in mutual funds

Chapter 14: Diversification, Portfolio Construction, and Asset Allocation

At the end of this chapter you will be able to:

1. Identify how to reduce risk and allocate assets with mutual funds
2. Recognize the use of beta coefficients to adjust asset allocation
3. Recognize different investment strategies for different stages and different goals in life