|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  | **Course Outline and Evaluation Summary**  Course Code: IDC4U1 | |  |
|  | Title of Course: Financial Securities | 416-395-3210 | |
|  | Department: Business |  | |

|  |
| --- |
| **Course Description** |
| In this course, students will investigates financial management, capital markets, and the ways in which capital is acquired. Students will use diverse information skills, resources and technologies to gather information related to a variety of Canadian and international financial institutions, investigate the conceptual and mathematical foundations of increasing net worth, and examine investments in the stock market (i.e. the risks and safeguards in stock trading, stocks as investments, creating investment portfolios.) They will also analyze the social impact of personal and corporate investment decisions and will learn to solve problems through theoretical investigations, systems thinking approaches and case studies. |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Course Evaluation**  Course evaluations incorporate one or more of the achievement categories (KICA). A brief description of each category can be found [here](about:blank). The final grade is calculated using the weighted percentages below. | | | | | |
| **Term Work:** | **A variety of tasks where you show your learning and have marks assigned using the Achievement Categories/Strands** | | **Summative**  **Evaluation:** | **Marked summative tasks which assess your learning on the entire course** | |
| 70% | 20 | Knowledge & Understanding | 30% | 30 | Culminating Task |
| 20 | Thinking & Inquiry |
| 40 | Application | n/a | Final Exam |
| 20 | Communication |

|  |
| --- |
| **Learning Skills** |
| Learning skills provide Information to help students understand what skills, habits & behaviors are needed to work on to be successful. These are not connected with any numerical mark. A brief description of each skill can be found [here](about:blank#page=17).  **Responsibility, Organization, Independent Work, Collaboration, Initiative and Self-Regulation**  E – Excellent G – Good S – Satisfactory N – Needs Improvement |

|  |
| --- |
| **Required Materials:** Any educational resource required for this course will be provided by the school. It is the student’s responsibility to come to class with these materials. |

|  |
| --- |
| **School/Departmental/Classroom Expectations** |
| **Attendance:** The student is expected to attend class on time. Parents/guardians will be contacted if lateness/attendance becomes an issue/hindrance. If the student knows about an absence in advance, they should contact the teacher.  **Plagiarism/Cheating:** A mark of 0 will be assigned for any work submitted that does not belong to the student. A mark of 0 will be assigned to a student who was found to have cheated. Parents/guardians will be informed.  **Missed Work:** If a student is absent from class, (e.g. illness, sports team) it is **their** responsibility to find out what they have missed and to catch up. The student is responsible for completing all of the work that was missed due to an absence. If a student misses an assignment or test without a legitimate explanation and documentation, marks up to and including the full value of the evaluation may be deducted. Make-up tests must be arranged to be written.  **Late Work:** Late work may result in a deduction of marks up to and including the full value of the evaluation. |

\\\\

|  |  |  |  |
| --- | --- | --- | --- |
| **Course Assessment Tasks** | | | |
| ***Unit/Topic/Strand*** | ***Big Ideas*** | ***Major Assignments / Evaluations*** | ***Estimated Duration*** |
| Unit 1:  Research-techniques and the history and development of trade and commerce | Developing a research strategy  Evaluating webpages  Key investment terms  Causes for Financial Crises  Economic Theorists & Financial Gurus | Assignments and unit test | 10 classes |
| Unit 2: Understanding Taxation | Overview of Canada’s Tax System  History of Taxes  Today’s Taxation Issues  Completing Tax Returns  Taxation Case Study | Case study and unit test | 15 classes |
| Unit 3: Macroeconomics | Key Macroeconomic concepts  The Business Cycle and Labour Markets  Interest and Exchange Rates  Fiscal and Monetary Policy | Quizzes and unit test | 15 classes |
| Unit 4: Corporations and Financial Statements | Forms of ownership  Incorporation  Understanding Financial Statements  Ratio Analysis | Assignments and unit test | 15 classes |
| Unit 5:  Equity Based Securities and Fixed Income & Managed Products | Equity Markets  Long, Short, and Margin Sales  Put and Call Options  Fixed Income Securities | Online Investment Contest, assignments and unit test | 15 classes |
| Unit 6:  The Client Portfolio | The Client Portfolio Preparation  Implementing the Research | Quiz (covered in culminating activity) | 9 classes |
| Unit 7:  Corporate Governance & Social Responsibility Careers in Finance | Ethics at the Top – Corporate Governance  Institutional Investors Effect Change  Exploration of Careers in Finance | Assignments and unit test | 9 classes |
| Culminating Task(s) |  | TBA |  |