

RICHVIEW COLLEGIATE INSTITUTE

PROGRAM AREA: Interdisciplinary Studies	COURSE NAME: Financial Securities
COURSE CODE: IDC4U (INTBUS)	GRADE/LEVEL: Grade 12, University Preparation
PREREQUISITE: Any Grade 11 University Credit	CREDIT VALUE: 1.00

Cost of Textbook/equipment replacement: _____ **Additional Course Costs:** _____
(if lost or damaged)

Textbooks(s)/Resources: The Wealthy Barber, D. Chilton

COURSE DESCRIPTION:

This course investigated financial management, capital markets, and 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 (e.g. 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 and case studies.

CURRICULUM STRANDS (UNITS) and OVERALL EXPECTATIONS:

Financial Securities is divided into three strands:

Theory & Foundation

- TFV.01: demonstrate an understanding of the key ideas and issues related to each of the subjects or disciplines studied.
- TFV.02: demonstrate an understanding of the different structures and organization of each of the subjects or disciplines studied.
- TFV.03: demonstrate an understanding of the different perspectives and approaches used in each of the subjects or disciplines studied.
- TFV.04: demonstrate the skills and strategies used to develop interdisciplinary products and activities.

Processes and Methods of Research

- PMV.01: be able to plan for research, using a variety of strategies and technologies;
- PMV.01 be able to access appropriate resources, using a variety of research strategies and technologies;
- PMV.03: be able to process information, using a variety of research strategies and technologies;
- PMV.04: be able to assess and extend their research skills to present their finding and solve problems.

Implementation, Evaluation, Impacts, and Consequences

- IEV.01: Implement and communicate information about interdisciplinary endeavours, using a variety of methods and strategies;
- IEV.02: evaluate the quality of interdisciplinary endeavours, using a variety of strategies;
- IEV.03: analyse and describe the impact on society of interdisciplinary approaches and solutions to real-life situations;
- IEV.04: analyse and describe how interdisciplinary skills relate to personal development and careers.

Course Content- Units of Study

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

Unit 2: Understanding Taxation

- Overview of Canada's Tax System
- History of Taxes
- Today's Taxation Issues
- Completing Tax Returns
- Taxation Case Study

Unit 3: Macroeconomics

- Key Macroeconomic concepts
- The Business Cycle and Labour Markets
- Interest and Exchange Rates
- Fiscal and Monetary Policy

Unit 4: Corporations and Financial Statements

- Forms of ownership
- Incorporation
- Understanding Financial Statements
- Ratio Analysis

Unit 5: Equity Based Securities and Fixed Income & Managed Products

- Equity Markets
- Long, Short, and Margin Sales
- Put and Call Options
- Online Investment Contest
- Fixed Income Securities

Unit 6: The Client Portfolio

- The Client Portfolio Preparation
- Implementing the Research

Unit 7: Corporate Governance & Social Responsibility/Careers in Finance

- Ethics at the Top – Corporate Governance
- Institutional Investors Effect Change
- Exploration of Careers in Finance

Assessment and Evaluation

Assessment and Evaluation are based on the expectations and levels of achievement outlined in the provincial curriculum document for each subject. A wide range of assessment and evaluation opportunities allows students to demonstrate their learning in a variety of ways. This information provides the basis for reporting student grades on the Provincial Report Card. A final mark will be calculated using the following categories or strands.

70% Course Evaluation (based on the following % breakdown of categories/strands):

All four achievement categories/strands do not need to be evaluated in each evaluation task.

Communication (25%)	Knowledge/Understanding (25%)	Thinking and Inquiry (25%)	Application/Making Connections (25%)
<i>Presentations</i>	<i>Tests/Quizzes Assignments</i>	<i>Case Studies Reports</i>	<i>In-Class Assignments Practical Work</i>

30% Final Evaluation (based on the above % breakdown of categories/strands):

Components of Summative Evaluation:

1. Summative Project

*** A detailed explanation of the culminating activity/activities will be distributed to students in the class.*

Learning Skills: *The report card provides a record of the learning skills, demonstrated by the student in every course in the following six categories: **Responsibility, Independent Work, Initiative, Organization, Collaboration, Self-Regulation.** The learning skills are evaluated using a four-point scale (E-Excellent, G-Good, S-Satisfactory, N-Needs Improvement).*

Please refer to the Student Agenda Planner for details regarding the Achievement Chart and Learning Skills.

It is Imperative that all students adhere to “Richview’s Evaluation Policy” regarding their 70% Term Work and 30% Culminating Activities.