



The Bishop Strachan School
Department Name: Canadian, Business and World Studies

Course Title: Interdisciplinary Studies - Financial Securities

Grade Level: 12

Ministry Course Code: IDC4U

Teacher's Name: Mary-Ellen Moran

Developed by: Mary-Ellen Moran

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Revision Date:

Developed from: Interdisciplinary Studies, The Ontario Curriculum Grades 11 and 12, 2002.

Text: None

Prerequisite: Any university or university/college preparation course

Credits: 1.0

Length: 110 hours

Course Description/Rationale

Interdisciplinary Studies

This course will help students develop and consolidate the skills required for and knowledge of different subjects and disciplines to solve problems, make decisions, create personal meaning, and present findings beyond the scope of a single subject or discipline. Students will apply the principles and processes of inquiry and research to effectively use a range of print, electronic, and mass media resources; to analyse historical innovations and exemplary research; and to investigate real-life situations and career opportunities in interdisciplinary endeavours. They will also assess their own cognitive and affective strategies, apply general skills in both familiar and new contexts, create innovative products, and communicate new knowledge.

Financial Securities

This course combines the expectations for Interdisciplinary Studies, Grade 12, University Preparation with selected expectations from two or more other courses (e.g., Principles of Financial Accounting, Grade 12, University/College Preparation; Analysing Current Economic Issues, Grade 12, University Preparation; Mathematics of Data Management, Grade 12, University Preparation; Challenge and Change in Society, Grade 12, University/ College Preparation).

This course investigates 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 investment in the stock market (e.g., the risks and safeguards in stock trading, stocks as investments, creating investment portfolios). They will also analyse the social impact of personal and corporate investment decisions and will learn to solve problems through theoretical investigation, systems thinking approaches, and case studies.

Overall Curriculum Expectations

Theory and Foundation

1. Demonstrate an understanding of the key ideas and issues related to each of the subjects or disciplines studied;
2. Demonstrate an understanding of the different structures and organization of each of the subjects or disciplines studied;
3. Demonstrate an understanding of the different perspectives and approaches used in each of the subjects or disciplines studied;
4. Demonstrate the skills and strategies used to develop interdisciplinary products and activities.

Process and Methods

5. Be able to plan for research, using a variety of strategies and technologies;
6. Be able to access appropriate resources, using a variety of research strategies and technologies;
7. Be able to process information, using a variety of research strategies and technologies;
8. Be able to assess and extend their research skills to present their findings and solve problems.

Implementation, Evaluation, Impacts and Consequences

9. Implement and communicate information about interdisciplinary endeavours, using a variety of methods and strategies;
10. Evaluate the quality of interdisciplinary endeavours, using a variety of strategies;
11. Analyse and describe the impact on society of interdisciplinary approaches and solutions to real-life situations;
12. Analyse and describe how interdisciplinary skills relate to personal development and careers.

Instructional Hours Summary

Course Content Unit	Classroom Hours	Field Trip Hours	Exam Hours	Independent Study/Student Teacher Conference	Total
1. Economic Principles	12				12
2. Fundamental Investment Concepts	20			2	22
3. Risk and Return	15				15
4. Corporations and Financial Statements	21			3	24
5. Portfolio Management	20			3	23
6. Opportunities in Finance	10			2	12
Exam			2.5		2.5
Total	98		2.5	12	110.5

Unit Descriptions

Unit 1 – *Economic Principles*

Students begin the study of the financial securities industry by being introduced to some macroeconomic concepts, both market and economic events impacting investment performance. Students start with some of the common economic building blocks, such as economic growth, interest rates, the labour markets, the causes of inflation and determinants of the exchange rate. Students will review the business cycle and fiscal and monetary policy. These economic principles form the basis for the students understanding how economics and the economy tie into the process of making an investment decision.

Unit 2 – *Fundamental Investment Concepts*

Students are introduced to the highly competitive securities industry and its key role in the Canadian investment marketplace. As a part of exploring the capital markets, students will be exposed to, and will study in depth, both the stock market and the bond market. Students will examine a host of investment products, such as index-linked GICs, index stock options, derivatives, segregated funds, royalty trusts, and REITs. Students will learn the variety of strategies that have been developed by examining and solving specific investment problems as they are introduced to modern portfolio theory and other modern theories of investment

Unit 3 – *Risk and Return*

Recognizing that there are no perfect securities, students will examine the measures and methods used by investors to estimate risk and predict return. Students will integrate information about individual securities, the markets, and the different analysis techniques to focus on developing securities portfolios designed to meet the specific needs of investors.

Unit 4 – *Corporations and Financial Statements*

In addition to conducting economic and industry analysis, students will conduct a company analysis by exploring and interpreting the annual reports of various Canadian corporations to assess the strengths and weaknesses of the corporations. While gaining insights into the purpose and need of annual reports and how and why annual reports have a specific format, students will use financial analysis techniques to understand and analyze corporate financial statements for decision-making purposes. Students explore and evaluate the methods of financing available to businesses and the implications to the stakeholders. Students understand and apply the concept of professional judgment and the rules of professional conduct, as well as investigate the rationale and insight of corporate governance and business ethics.

Unit 5 – *Portfolio Management*

In addition to exploring asset allocation strategies, students will construct and manage an investment portfolio to for a client; students will outline a client profile, explain the client's objectives, and set financial goals. Contemporary issues in the financial securities industry are explored and analyzed relative to the operation and managements of information and the effects on decision-making.

Unit 6 – *Career Opportunities in Finance*

Financial analysts, investment analysts, traders, commercials bankers, researchers, investment advisor, fund managers, underwriters, accountants are some of the careers to be explored as a part of understanding the breadth of the financial securities market.

Teaching/Learning Strategies

<input type="checkbox"/> Brainstorming	<input type="checkbox"/> Text reference/Reading	<input type="checkbox"/> Debate	<input type="checkbox"/> Independent study
<input type="checkbox"/> Cooperative Learning	<input type="checkbox"/> Note taking	<input type="checkbox"/> Peer analysis	<input type="checkbox"/> Case Studies
<input type="checkbox"/> Group work	<input type="checkbox"/> Lecture	<input type="checkbox"/> Review activities	<input type="checkbox"/> Research
<input type="checkbox"/> Structured discussion	<input type="checkbox"/> Socratic	<input type="checkbox"/> Game	<input type="checkbox"/> Presentations
<input type="checkbox"/> Student-led discussion	<input type="checkbox"/> Demonstration	<input type="checkbox"/> Conferences	<input type="checkbox"/> Reflection
<input type="checkbox"/> Case studies	<input type="checkbox"/> Visual organizers	<input type="checkbox"/> Field trip	<input type="checkbox"/> Interview/Conference
<input type="checkbox"/> Solution presentation	<input type="checkbox"/> Investigations	<input type="checkbox"/> Guest Speakers	<input type="checkbox"/> Video
<input type="checkbox"/> Practical exercises	<input type="checkbox"/> Teacher-led review	<input type="checkbox"/> Role Play	

Assessment/Evaluation Strategies

Paper and Pencil	Performance Methods	Personal Communication	Other
Practice exercises	Oral Presentation	Student/Teacher Conferences	Informal Observation
Quizzes	PowerPoint Presentation	Student Discussion	Formal Observation
Tests	Business Report	Seminars	Teacher log
Assignments	Projects	Reflection	Checklist
Projects	Discussion/Debate	Self-evaluation	Rubrics
Examination	Problem Demonstration	Peer evaluation	
	Case Studies	Interviews	
	Scenarios		
	Role Play		

Assessment/Evaluation

Seventy per cent (70%) of the final grade will be based on evaluations conducted throughout this course. This portion of the grade should reflect the students' ***most consistent level of achievement*** throughout this course, although special consideration should be given to the more recent evidence of achievement.

Thirty per cent (30%) of the final grade will be based on a final evaluation in the form of an examination, performance, essay, and/or other method of evaluation suitable to the course content and administered towards the end of the course.

Teachers will ensure that student work is assessed and/or evaluated in a balanced manner with respect to the four categories (see below), and that achievement of particular expectations is considered within the appropriate categories. The four categories should be considered as interrelated, reflecting the wholeness and interconnectedness of learning. The categories of knowledge and skills are:

- Knowledge and Understanding (20-30%)
- Thinking (20-30%)
- Communication (20-30%)
- Application (20-30%)

Assessment/Evaluation

Type of Assessment	Unit Title/Length	Overall Expectations	Assessment Strategies
70%	Unit 1 – Economic Principles		Assignment: Economic Principles
			Case Study:
	Unit 2 – Fundamental Investment Concepts		Assignment: Fundamental Investment Concepts
			Case Study
	Unit 3 – Risk and Return		Stock Market Competition
			Risk and Return Assignment
			Case Study
	Unit 4 – Corporations and Financial Statements		Corporate Governance and Ethics Investigation, Report and Presentation
			Case Study
	Unit 5 – Portfolio Management		Financial Portfolio
			Case Study
	Unit 6 – Opportunities in Finance		Reflection
Case Study			
30%	1. Summative		Financial Portfolio
	2. Exam		Case Study
			Total

Course Resources

Software

MS-Office 2007 (Word, Excel, PowerPoint, Access, Publisher, FrontPage)

Print

Canadian Securities Course, Volume 1, Toronto, CSI Global Education, Inc., 2008.

Canadian Securities Course, Volume 2, Toronto, CSI Global Education, Inc., 2008.

Clary and Jones, *Investments: Analysis and Management*, 2nd Canadian edition, Toronto: John Wiley & Sons Canada, 2005.

Epping, Randy Charles, *The 21st Century Economy*, Toronto, Random House of Canada Limited (Vintage Books), 2009.

Graham, Benjamin, *The Intelligent Investor*, New York: Harper Collins, 2006.

Investor Education Fund, *Taking Stock in Your Future, Intermediate*, www.investorED.ca

Investor Education Fund, *Taking Stock in Your Future, Senior*, www.investorED.ca

Investor Education Fund, *Fair Play*, www.investorED.ca

Magazines

Money Sense

The Economist

Canadian Business

Business Week

Other various magazines

Newspapers

Globe and Mail – <http://www.globeandmail.com>

National Post – <http://www.nationalpost.com>

The Toronto Star – <http://www.torstar.com>

New York Times - <http://www.nytimes.com>

Other various newspapers

Websites

www.bank-banque-canada.ca

www.globeinvestor.com

www.tsx.com

www.cbc.com

www.bloomberg.com

www.smartmoney.com

www.sedar.com

www.ipocentral.com

www.equityresearcher.com

www.bondcan.com

www.investored.ca

Achievement Chart – Grades 11 and 12, Interdisciplinary Studies

Categories	50–59% (Level 1)	60–69% (Level 2)	70–79% (Level 3)	80–100% (Level 4)
Knowledge/ Understanding	The student:			
– knowledge of facts and ideas	– demonstrates limited knowledge of relevant facts and ideas	– demonstrates some knowledge of relevant facts and ideas	– demonstrates considerable knowledge of relevant facts and ideas	– demonstrates thorough knowledge of relevant facts and ideas
– understanding of concepts (e.g., connectedness, interdependence, multiple perspectives)	– demonstrates limited understanding of required concepts	– demonstrates some understanding of required concepts	– demonstrates considerable understanding of required concepts	– demonstrates thorough and insightful understanding of required concepts
– understanding of relationships between concepts and/or disciplines	– demonstrates limited understanding of relationships between concepts and/or disciplines	– demonstrates some understanding of relationships between concepts and/or disciplines	– demonstrates considerable understanding of relationships between concepts and/or disciplines	– demonstrates thorough understanding of relationships between concepts and/or disciplines
Thinking/Inquiry	The student:			
– use of thinking skills that go beyond the scope of a single discipline (e.g., prioritizing, solving problems, making analogies, predicting, inferring, reasoning)	– uses a limited range of thinking skills	– uses a moderate range of thinking skills	– uses a considerable range of thinking skills	– uses a wide range of thinking skills confidently and effectively
– use of critical-thinking skills (e.g., problem solving from multiple perspectives, decision making that uses a systems approach)	– uses critical-thinking skills with limited insight and effectiveness	– uses critical-thinking skills with some insight and effectiveness	– uses critical-thinking skills with considerable insight and effectiveness	– uses critical-thinking skills with a high degree of insight and effectiveness
– application of an inquiry/research process (e.g., formulating questions, planning, selecting resources and technologies, analysing and evaluating information) to understand interdisciplinary relationships	– applies a few of the required skills and strategies of an inquiry/research process	– applies some of the required skills and strategies of an inquiry/research process	– applies most of the required skills and strategies of an inquiry/research process	– applies all or almost all of the required skills and strategies of an inquiry/research process
– application of creative-thinking skills (e.g., generating models of thinking and synthesis)	– applies creative skills with limited effectiveness and innovation	– applies creative skills with some effectiveness and innovation	– applies creative skills with considerable effectiveness and innovation	– applies creative skills with a high degree of effectiveness and innovation

Categories	50–59% (Level 1)	60–69% (Level 2)	70–79% (Level 3)	80–100% (Level 4)
Communication	The student:			
– communication of information and ideas	– communicates information and ideas with limited clarity	– communicates information and ideas with some clarity	– communicates information and ideas with considerable clarity	– communicates information and ideas with a high degree of clarity
– collaboration (e.g., interactive listening, team building, cooperative planning, leadership)	– collaborates with others with limited effectiveness	– collaborates with others with some effectiveness	– collaborates with others with considerable effectiveness	– collaborates with others with a high degree of effectiveness
– use of language, symbols, media, and technologies	– uses language, symbols, media, and technologies with limited accuracy and effectiveness	– uses language, symbols, media, and technologies with some accuracy and effectiveness	– uses language, symbols, media, and technologies with considerable accuracy and effectiveness	– uses language, symbols, media, and technologies with a high degree of accuracy and effectiveness
– communication for different audiences and purposes in real-life situations across the disciplines	– communicates with a limited awareness of audience and purpose	– communicates with some awareness of audience and purpose	– communicates with considerable awareness of audience and purpose	– communicates with a high degree of awareness of audience and purpose
– use of various communication forms and technologies	– demonstrates limited command of various forms and technologies	– demonstrates some command of various forms and technologies	– demonstrates considerable command of various forms and technologies	– demonstrates extensive command of various forms and technologies
Application	The student:			
– application of ideas and skills in familiar contexts	– applies ideas and skills in familiar contexts with limited effectiveness	– applies ideas and skills in familiar contexts with some effectiveness	– applies ideas and skills in familiar contexts with considerable effectiveness	– applies ideas and skills in familiar contexts with a high degree of effectiveness
– application of ideas and skills in new contexts	– applies ideas and skills in new contexts with limited effectiveness	– applies ideas and skills in new contexts with some effectiveness	– applies ideas and skills in new contexts with considerable effectiveness	– applies ideas and skills in new contexts with a high degree of effectiveness
– application of processes and technologies (e.g., the research process, multimedia and telecommunications technologies)	– applies processes and technologies with limited effectiveness and creativity	– applies processes and technologies with some effectiveness and creativity	– applies processes and technologies with considerable effectiveness and creativity	– applies processes and technologies with a high degree of effectiveness and creativity
– provision of explanations that incorporate new understandings	– provides explanations that incorporate a few new personal understandings	– provides explanations that incorporate some new personal understandings	– provides explanations that incorporate a considerable number of new personal understandings	– provides explanations that incorporate a significant number of new personal understandings
– finding connections (e.g., among disciplines, between a discipline and the world outside the school)	– finds connections with limited success	– finds connections with some success	– finds connections with considerable success	– finds connections with a high degree of success

Note: A student whose achievement is below 50% at the end of a course will not obtain a credit for the course.