SOUTH DAKOTA BOARD OF REGENTS
ACADEMIC AFFAIRS FORMS

New Course Request

SDSU	Arts, Humanities & Social Sciences / Economics
Institution	**Division/Department**
Dennis D. Hedge	1/23/2019
Institutional Approval Signature	**Date**

Section 1. Course Title and Description

Prefix & No.	Course Title	Credits
FIN 420	Student Managed Investment Fund	3
FIN 520	Student Managed Investment Fund	3

Course Description

This course involves hands-on experiential learning of real money management. Students will actively participate in all aspects of security analysis and portfolio management, including understanding investment ethics, generation of trading ideas, investment analysis, asset valuation and allocation, trading of financial securities, and performance report.

Pre-requisites or Co-requisites

Prefix & No.	Course Title	Pre-Req/Co-Req?
None		

Registration Restrictions

None

Section 2. Review of Course

2.1. Was the course first offered as an experimental course? ☐ Yes ☒ No

2.2. Will this be a unique or common course?

☒ Unique Course

Prefix & No.	Course Title	Credits
FIN 412-512	Security Analysis	3
AGEC 484	Trading in Agricultural Futures and Options	3

Provide explanation of differences between proposed course and existing system catalog courses below:

The proposed class compares with FIN 412-512 in that some of the same topics are covered (security/equity analysis), however FIN 412-512 does not provide the hands-on trading experience that the student managed investment fund class provides.

The proposed class compares with AGEC 484 in that both provide hands on analysis and trading experience, however the AGEC 484 only deals with agricultural futures and options.

Section 3. Other Course Information

3.1. Are there instructional staffing impacts?

☒ **No**. Schedule Management, explain below: Course has been offered as special topics (BADM/FIN 492-592) for 3 semesters and is already part of the instructor's teaching load.

3.2. Existing program(s) in which course will be offered: Business Economics (B.A./B.S.), Economics (B.A./B.S.), Agricultural Business (B.S.), Agricultural & Business Economics (B.S.)

3.3. Proposed instructional method by university: D – Discussion/Recitation

3.4. Proposed delivery method by university: 001 – Face to Face Term Based Instruction

3.5. Term change will be effective: Fall 2019

3.6. Can students repeat the course for additional credit? ⊠ Yes, total credit limit: 6 ☐ No

3.7. Will grade for this course be limited to S/U (pass/fail)? ☐ Yes ⊠ No

3.8. Will section enrollment be capped? ⊠ Yes, max per section: 10 in 420, 5 in 520 ☐ No

3.9. Will this course equate (i.e., be considered the same course for degree completion) with any other unique or common courses in the common course system database in Colleague and the Course Inventory Report? ☐ Yes ⊠ No

3.10. Is this prefix approved for your university? ⊠ Yes ☐ No

Section 4. Department and Course Codes (Completed by University Academic Affairs)

4.1. University Department Code: SECN

4.2. Proposed CIP Code: 52.0807

Is this a new CIP code for the university? ☐ Yes ⊠ No

NEW COURSE REQUEST
Supporting Justification for On-Campus Review

Zhiguang Wang	_Wang Zhiguang_	12/18/2018
Request Originator	**Signature**	**Date**

Eluned Jones	Eluned Jones	12/20/2018
Department Chair	**Signature**	**Date**

Jason McEntee	Jason McEntee	12/20/2018
School/College Dean	**Signature**	**Date**

1. Provide specific reasons for the proposal of this course and explain how the changes enhance the curriculum.

   FIN 420-520 will provides students hands-on experiential learning of real money management using funds endowed by private donors. The course has been offered for three semesters as a special topics course, and is schedule to be taught a fourth time during the spring 2019 semester (see enrollment numbers in the table below). The courses started with a $50,000 endowment in 2016, which has attracted additional donor funds of $181,081 and has had an ROI of 10.4% since inception. Students actively participate in all aspects of security analysis and portfolio management, including understanding investment ethics, generation of trading ideas, investment analysis, asset valuation and allocation, trading of financial securities, and performance report. The student managed investment fund class successfully competed in the 2017 Quinnipiac G.A.M.E. VII Forum, taking 1st place – Core Portfolio. The hand-on learning has been invaluable for graduates who have leveraged the experience into career paths in finance and investing.

Semester	FIN/BADM 492	FIN/BADM 592
Spring 2019 (enrollment as of 12/18/18)	8	4
Spring 2018	10	5
Spring 2017	7	5
Spring 2016	8	6

2. Note whether this course is: ☐ Required ⊠ Elective

3. In addition to the major/program in which this course is offered, what other majors/programs will be affected by this course?
   Students in any major across campus who are interested in hands-on investment experience. Students in pre-Pharmacy, Ecology & Environmental Science, Data Science, and Mechanical Engineering have taken the course.

4. If this will be a dual listed course, indicate how the distinction between the two levels will be made.
   Graduate level students will be required to lead investment analyses and to contribute more substantially to the term report.

5. Desired section size   10 in 420, 5 in 520

6. Provide qualifications of faculty who will teach this course. List name(s), rank(s), and degree(s).
   Zhiguang Wang, Associate Professor, Ph.D.

7. Note whether adequate facilities are available and list any special equipment needed for the course.
   First Dakota National Bank e-Trading Education Lab at South Dakota State University provides the specific hardware and software programs for the course.

8. Note whether adequate library and media support are available for the course.
   Yes.

9. Will the new course duplicate courses currently being offered on this campus?
   ☐ Yes   ☒ No

10. If this course may be offered for variable credit, explain how the amount of credit at each offering is to be determined.
    N/A