

A Complete Guide to Investing

Chapter 1:

Getting Started as an Investor

Learning Objectives:

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

- Differentiate between the different types of investments, financial versus real assets, direct versus indirect, and liquid versus illiquid
- Identify the features and attributes of stocks and bonds, and the drawbacks and benefits of each

Chapter 2:

Financial Markets and Investment Process

Learning Objectives:

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

- Recognize various aspects of securities and transactions
- Identify advantages and disadvantages of buying stock on margin and selling stock short

Chapter 3:

Return and Risk

Learning Objectives:

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

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

Chapter 4:

Fundamental Analysis

Learning Objectives:

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

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

Chapter 5:

Technical Analysis

Learning Objectives:

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

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

Chapter 6:

Common Stocks and Preferred Stocks

Learning Objectives:

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

- Recognize the characteristics of common stock

Chapter 7:

Common Stock Valuation

Learning Objectives:

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

- Recognize the fundamental valuations of common stock

- Differentiate price/earnings ratio approaches

Chapter 8:

Fixed Income Securities

Learning Objectives:

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

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

Chapter 9:

Investing in Options

Learning Objectives:

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

- Recognize the key terms and attributes for investing in options

Chapter 10:

Futures Contracts

Learning Objectives:

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

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

Chapter 11:

Global Investing

Learning Objectives:

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

- Recognize the advantages and risks of global investing
- Identify the methods of investing in international markets

Chapter 12:

Tax-Advantaged Investments

Learning Objectives:

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

- Recognize the attributes of tax advantaged investments like real estate investment trusts (REITs)
- Identify the advantages and disadvantages of the various types of retirement funds

Chapter 13:

Investing in Funds

Learning Objectives:

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

- Recognize the attributes of mutual funds, index funds and ETFs

Chapter 14:

Diversification, Portfolio Construction, and Asset Allocation

Learning Objectives:

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

- Identify how to reduce risk and allocate assets
- Recognize the use of beta coefficients to adjust asset allocation
- Recognize different investment strategies for different stages and different goals in life