

COURSE CODE: BUAD 361

COURSE TITLE: Selected Topics: Finance

Calendar Description

This course will focus on specialized topics in financial services. With different topics this course may be taken more than once for credit.

Prerequisite(s): 3rd year standing

Co-requisite(s): None

Prerequisite For: None

Substitutable Courses: None

Graduation Requirement: Elective - BBA & Diploma

Transfer Credit: N/A

Special Notes: None

Credits: 3

Hours per Week: 3

Originally Developed: December 2022

EDCO Approval:

CHAIR'S APPROVAL: 

Learning Outcomes

Outcome	Upon completion of this course students will be able to:
1	Critique the role of Biases and Heuristics in Financial Decisions.
2	Illustrate and differentiate amongst the key biases that lead people to make faulty financial judgements about risk.
3	Distinguish between the remedies appropriate to Behavioural biases.
4	Evaluate methods to incorporate Behavioural Finance into decision making.
5	Discern the differences between first and second-generation Behavioural Finance.

Course Objectives

Objectives	This course will cover the following content: See weekly course schedule below
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Professors

Name	Phone Number	Office	Email
Robert Ryan	4941	C132	rryan@okanagan.bc.ca

Evaluation Procedure

Group Project	20 %
Individual Case	20 %
Papers	30 %
Final Exam	30 %
Total	100 %

Group Project – Behaviourally Informed Portfolio (20%)

In teams of 3–4, students design a behaviourally informed investment approach for a specified investor profile. The group will propose a high-level investment policy (goals, risk profile, strategic asset mix), build a simple model portfolio (e.g., 4–6 holdings), and explain how their choices address real-world investor biases and decision errors. The final product is an infographic, video, or in-class presentation that communicates the investment approach and behavioural safeguards clearly to a non-technical audience (e.g., client or investment committee).

Case Assignment

A case will be studied which addresses a current issue within Behavioural Finance. You will prepare a case analysis in writing which is an expression of your application of the learnings within this course. The analysis will be supported by evidence, logic, and reasoning (e.g. research studies, concepts from class, etc.), as opposed to a mere summary of the reading.

Papers

Paper 1 – Behavioural Investor & Bias Analysis (15%)

Individually, students write a minimum 1,500-word paper analyzing a single investor (a course persona or themselves, written in third person) using Behavioural Finance concepts. The paper describes the investor's goals, time horizon, constraints, and risk capacity/tolerance, then identifies 3–5 key

behavioural tendencies (biases/heuristics) and explains how these tendencies are likely to affect portfolio choices and trading behaviour. The emphasis is on accurate use of behavioural theory and clear links to real investment decisions.

Paper 2 – Behavioural Reflection on Portfolio Experience (15%)

Individually, students write a minimum 1,500-word reflective paper based on their experience working on the group behavioural portfolio project. The paper identifies several specific “behavioural moments” (e.g., disagreements, temptations to chase performance, discomfort with volatility), analyzes them using course concepts, and evaluates whether the group’s decisions aligned with behavioural best practices and the investor’s profile. Students conclude by outlining lessons for their own future professional practice in financial planning or CFA-type roles.

Required Materials

Readings to be assigned by prof each week.

Notes

All assignments are due as noted in the course timeline available on Moodle for this course.

Final exams will only be rescheduled in accordance with College policy as set out in the Okanagan College Calendar; inconvenience to the student is not a valid reason for rescheduling an exam.

Course Schedule

(Subject to change at the discretion of the professor)

Date		Topic	Textbook
2026 Week of:		Mon, Jan 5 - Classes begin Fri, Jan 16 - Last day to register for a course and to receive a refund for course drop Mon, Feb 16 - Statutory Holiday (no classes) Tue, Feb 17 - Fri, Feb 20 - Mid-semester study break (no classes) Fri, Mar 6 - Last day to withdraw from a course without academic penalty Fri, Apr 3 & Mon, Apr 6 - Statutory Holiday (no classes) Fri, Apr 10 - Last day of regularly scheduled classes Mon, Apr 13 - Wed, Apr 22 - Final exam period – see policy.	Chapter(s):
JAN 5 - 10	1	BEHAVIOURAL FINANCE (BF) FOUNDATIONS AND PERPECTIVES – INTRODUCTION	ASSIGNED READINGS
JAN 11 - 17	2	BF FOUNDATIONS AND PERPECTIVES – BEHAVIOURAL VS TRADITIONAL	ASSIGNED READINGS
JAN 18 - 24	3	BF FOUNDATIONS AND PERPECTIVES – 1 ST AND 2 ND GENERATION BF	ASSIGNED READINGS
JAN 25 - 31	4	BF FOUNDATIONS AND PERPECTIVES – MARKET BEHAVIOURS AND PORTFOLIO CONSTRUCTION	ASSIGNED READINGS
FEB 1 - 7	5	BF & INDIVIDUALS – INTRODUCTION	ASSIGNED READINGS
FEB 8 - 14	6	BF & INDIVIDUALS – COGNITIVE ERRORS	ASSIGNED READINGS
FEB 15 - 21	7	FAMILY DAY & READING WEEK	
FEB 22 - 28	8	BF AND THE CORPORATION – INTRODUCTION	ASSIGNED READINGS
MAR 1 - 7	9	BF AND THE CORPORATION – CAPITAL BUDGETING	ASSIGNED READINGS
MAR 8 - 14	10	BF AND THE CORPORATION – DIVIDEND POLICY	ASSIGNED READINGS
MAR 15 - 21	11	BF AND THE MARKETS – INTRODUCTION	ASSIGNED READINGS
MAR 22 - 28	12	BF AND THE MARKETS - MARKET BEHAVIOUR	ASSIGNED READINGS
MAR 29 - APR 4	13	BF AND THE MARKETS - MARKET BEHAVIOUR	ASSIGNED READINGS
APR 6 - 10	14	FINAL EXAM PREP	
	15	Final Exam Period	

Skills Across the Business Curriculum

The School of Business promotes core skills across the curriculum. These skills include reading, written and oral communications, computers, small business, and academic standards of ethics, honesty and integrity.

Student Conduct

What is the Disruption of Instructional Activities?

At Okanagan College (OC), disruption of instructional activities includes student “conduct which interferes with examinations, lectures, seminars, tutorials, group meetings, other related activities, and with students using the study facilities of OC”, as well as conduct that leads to property damage, assault, discrimination, harassment and fraud. Penalties for disruption of instructional activities include a range of sanctions from a warning and/or a failing grade on an assignment, examination or course to suspension from OC.

Academic Honesty: Students have a responsibility to read the [OC Academic Integrity Policy](#).

What is Cheating?

“Cheating includes but is not limited to dishonest or attempted dishonest conduct during tests or examinations in which the use is made of books, notes, diagrams or other aids excluding those authorized by the examiner. It includes communicating with others for the purpose of obtaining information, copying from the work of others and purposely exposing or conveying information to other students who are taking the test or examination.”

Students must submit independently written work. Students may not write joint or collaborative assignments with other students unless the instructor approves it in advance as a group/team project. Students who share their work with other students are equally involved in cheating.

What is Plagiarism?

Plagiarism is defined as “the presentation of another person’s work or ideas without proper or complete acknowledgement.” It is the serious academic offence of reproducing someone else’s work, including words, ideas and media, without permission for course credit towards a certificate, diploma, degree and/or professional designation. The defining characteristic is that the work is not yours.

“Intentional plagiarism is the deliberate presentation of another’s work or ideas as one’s own.” Intentional plagiarism can be a copy of material from a journal article, a book chapter, data from the Internet, another student, work submitted for credit in another course or from other sources.” “Unintentional plagiarism is the inadvertent presentation of another’s work or ideas without proper acknowledgement because of poor or inadequate practices. Unintentional plagiarism is a failure of scholarship; intentional plagiarism is an act of deceit.”

What are the Students’ Responsibilities to Avoid Plagiarism?

Students must acknowledge the sources of information used on all their assignments. This usually involves putting the authors’ name and the year of publication in parentheses after the sentence in which you used the material, then at the end of your paper, writing out the complete references in a Reference section.

“Students are responsible for learning and applying the proper scholarly practices for acknowledging the work and ideas of others. Students who are unsure of what constitutes plagiarism should refer to the UBC publication *“Plagiarism Avoided; Taking Responsibility for your Work”*. This guide is available in OC bookstores and libraries.

Students are expected to understand research and writing techniques and documentation styles. The School of Business requires the use of the APA or MLA style but suggests that students cite references using the APA guidelines (see Publication Manual of the American Psychological Association, 6th edition (2009)). A copy of the APA manual is available in the reference section and available for circulation from OC libraries. The library website has access to these two major citing styles.

What are the Penalties for Plagiarism and Cheating?

The Okanagan School of Business does not tolerate plagiarism or cheating. All professors actively check for plagiarism and cheating and the Okanagan School of Business subscribes to an electronic plagiarism detection service. All incidents of plagiarism or cheating are reported and result in a formal letter of reprimand outlining the nature of the infraction, the evidence and the penalty. The Dean of the School of Business and the Registrar record and monitor all instances of plagiarism and cheating. Penalties for plagiarism and cheating reflect the seriousness and circumstances of the offence and the range of penalties includes suspension from OC.