



ROADMAP of BUSINESS ADMINISTRATION COURSES for the

TITAN CAPITAL MANAGEMENT APPLIED INVESTMENT CERTIFICATE

TCM Applied Investment Certificate required courses are in **bold** font.

ACADEMIC YEAR	FALL SEMESTER	SPRING SEMESTER	SUMMER SEMESTER
YEAR 1	ECON 201 PHIL¹ 100, 105, 106, or 120	BUAD 201 ECON 202	
YEAR 2	ACCT 201A BUAD 301 MGMT 246 ISDS 309 ²	ACCT 201B FIN 341³ ISDS 351 and 361A	Required co-curricular activities for Fin 341: Complete a finance-related internship
YEAR 3	ECON 315 FIN 320 and 341 ISDS 361B MGMT 339 MKTG 351	ECON 320 FIN 321, 340, 341, & 442⁴ MGMT 340	Required co-curricular activities for Fin 442: Complete the Bloomberg Market Concepts certificate
YEAR 4	FIN 335 and 435 FIN 443A⁵ Required co-curricular activities for Fin 443A: Attend a student investment conference as arranged by the TCM program	FIN 443B⁶, FIN 463 MGMT 449 Required co-curricular activities for Fin 443B: Attend a financial modeling seminar arranged by the TCM program	

¹ Students must choose **one philosophy course on logic and reasoning**. The course may be taken during any semester.

² **ISDS 309** is an introductory computer programming course. It is highly recommended, but not required.

³ **Fin 341** is a 1-unit lab that can be repeated up to 3 times to receive elective credit toward the finance concentration. Certificate students are only required to take the class once, but repetition is highly recommended.

⁴ **Fin 442** is a foundational course in stock and bond analysis which should be offered in summer, fall, and spring. Fin 321 and 340 are corequisites, though these courses are best taken in advance.

⁵ **Fin 443A** is an advanced investment course focusing on bonds. The class may be offered in fall and/or spring. Prerequisite: Fin 442 with a 'B' or better (3.0), corequisite: Fin 435, though this course is best take in advance.

⁶ **Fin 443B** is an advanced investment course focusing on stocks. The class may be offered in fall and spring. Prerequisite: Fin 442 with a 'B' or better (3.0).

REQUIRED COURSES FOR THE CERTIFICATE (19 Units)

Course Name	Units
Fin 335 Financial Analysis for Investors and Lenders	3
Fin 340 Introduction to Investments	3
Fin 341 Student Managed Investment Fund	1
Fin 435 Capital Markets and Fixed Income	3
Fin 442 Portfolio Management	3
Fin 443A Bond Analysis	3
Fin 443B Equity Analysis	3

ELECTIVE COURSES FOR THE CERTIFICATE (Choose one @ 3 Units)

Course Name	Units
Phil 105 Critical Thinking	3
Phil 106 Introduction to Logic	3
Phil 120 Introduction to Ethics	3
Phil 312 Business and Professional Ethics	3
Phil 315 Philosophical Argument and Writing	3
Fin 463 Professional Ethics, Corporate Compliance and Regulation	3

CO-CURRICULAR REQUIREMENTS FOR INVESTMENT CERTIFICATE STUDENTS

Roadmap courses and co-curricular activities may be completed at any time but are best aligned with the required certificate courses as detailed below.

1. **Fin 341: Manage a balanced portfolio of stocks and bonds associated with the CFA Society Orange County**
 - a. Complete one finance-related internship lasting at least 6 weeks
2. **Fin 442: Monitor all portfolios managed by the Titan Capital Management program**
 - a. Complete the online Bloomberg Market Concepts certificate
 - b. One stock or bond trade recommendation must be approved by the TCM Advisory Board
 - c. Participate on a sector team for security analysis and recommendations to the TCM portfolio managers
3. **Fin 443A: Manage the TCM Bond portfolio and TCM All-Weather portfolio**
 - a. Attend a student investment conference as arranged by the TCM program
 - b. One bond trade recommendation must be approved by the TCM Advisory Board
 - c. Act as portfolio manager for one TCM portfolio, one semester (either in 443A or 443B)
 - d. Upon approval of the competition coach and class instructor, students may elect to compete in the CFA Investment Research Challenge for course credit
4. **Fin 443B: Manage the TCM Equity portfolio and TCM President's Scholars portfolio**
 - a. Complete an in-person training program on financial modeling and valuation as arranged by the TCM program
 - b. One stock trade recommendation must be approved by the TCM Advisory Board
 - c. Act as portfolio manager for one TCM portfolio, one semester (either in 443A or 443B)
 - d. Upon approval of the competition coach and class instructor, students may elect to compete in the CFA Investment Research Challenge for course credit