FALL 2023/WINTER 2024

INVESTING COURSES

INVESTING FOR SUCCESS LEVEL 1 & 2

Learn important principles for successful investing, as well as current market conditions and investment considerations. Topics include: capital markets, picking stocks, investment strategies, mutual funds, and taxation.

COURSE: PIW 132 | 15 Hours
030 | Jan 31 - Mar 6, 2024 | Online Synchronous | Wednesday | 6 - 8:30 pm
031 | Apr 30 - Jun 4, 2024 | Online Synchronous | Tuesday | 6 - 8:30 pm

Explore further the securities markets and learn pricing and trading concepts for different types of financial instruments. A basic understanding of stocks, bonds and mutual funds will be assumed. Topics covered include pricing and trading techniques in fixed income, equity, derivatives, and modern portfolio theory. Discuss the benefits and challenges associated with portfolio construction. This course is intended for students who have taken PIW 132 Investing for Success Level 1 (formerly titled Personal Investment Strategies) or equivalent.

COURSE: PIW 142 | 15 Hours
011 | Feb 6 - March 12, 2024 | Online Synchronous | Tuesday | 6 - 8:30 pm

NEW!

FUNDAMENTALS OF STOCK INVESTING

A stock or equity investment is money invested in a company by purchasing shares of that business in the stock markets. Investing in equities effectively puts your money to work and builds your assets and financial well-being. This course will cover important principles for equity investing. Topics include equity valuation processes focused on company analysis, dividends, free cash flow, and market-based valuation techniques. Although simple math skills are applied, investment concepts will be the primary focus. Basic knowledge of investment, economics or finance will also be helpful. Everyone is welcome in this interactive and engaging course taught by an industry expert.

COURSE: PIW 162 | 15 Hours
002 | May 6 - June 17, 2024 | Online Synchronous | Monday | 6 - 8:30 pm

INSTRUCTOR

UCalgary alumnus, David Sherlock is an experienced investment professional, specializing in developing quantitative North American equity models. He has also held roles in investment research and wholesaling, and for more than a decade, has been a portfolio manager serving high net-worth families. He is also an experienced instructor teaching Canadian Securities and various investment management courses. In 2012, he was the winner of the Globe and Mail Stock Picking contest. David holds a BA in Economics and Political Science, and several designations, including Canadian Investment Manager, Personal Financial Planner, Financial Management Advisor, Associate Institute of Canadian Bankers, and Fellow of CSI designations.

David Sherlock,
CIM, PFP, AICB, FCSI
Portfolio Manager

UNIVERSITY OF CALGARY
CONTINUING EDUCATION