

FBLA HS: Securities & Investments

Topic A: Investment Fundamentals	MBA Research Performance Indicators	LAPs
Task		
1. Define terminology common to securities & investments	FI:077 Explain types of investments (CS)	LAP-FI-077 Invest for Success (Types of Investments)
2. Demonstrate knowledge of savings	FI:270 Explain the need to save and invest (CS) FI:077 Explain types of investments (CS)	**LAP-QS-030, Supersize Your Money (Need to Save and Invest) LAP-FI-077 Invest for Success (Types of Investments)
3. Identify stages of investing and relationship between risk and return	FI:077 Explain types of investments (CS)	LAP-FI-077 Invest for Success (Types of Investments)
4. Identify sources of financial information to make investment decisions	FI:274 Describe sources of securities information (CS)	**LAP-QS-036, The Source Is With You (Finding and Evaluating Securities Information)
Topic B: Investment Wrappers, Taxation, and Trusts	MBA Research Performance Indicators	LAPs
Task		
1. Describe individual savings accounts	FI:077 Explain types of investments (CS)	LAP-FI-077 Invest for Success (Types of Investments)
2. Demonstrate knowledge of Pensions	FI:569 Discuss the nature of retirement planning (CS)	
3. Demonstrate knowledge of taxation	FI:067 Explain the nature of tax liabilities (PQ)	

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4. Describe and Identify Investment bonds	FI:077 Explain types of investments (CS) PD:313 Explain the nature of bonds (SP)	LAP-FI-077 Invest for Success (Types of Investments) **LAP-QS-033, The Name’s Bond... Just Bond (Nature of Bonds)
Topic C: Investment Product & Funds	MBA Research Performance Indicators	LAPs
Task		
1. Identify and explain the different types of loans	FI:002 Explain the purposes and importance of credit (CS) PD:154 Describe types of personal banking products and services (CS)	LAP-FI-002 Give Credit Where Credit Is Due (Credit and Its Importance)
2. Explain the purposes of mortgages	FI:002 Explain the purposes and importance of credit (CS) PD:154 Describe types of personal banking products and services (CS)	LAP-FI-002 Give Credit Where Credit Is Due (Credit and Its Importance)
3. Demonstrate the knowledge and purpose of life assurance		
4. Describe and explain unit trusts	PD:208 Describe trust services available to customers (SP)	
5. Describe opened ended investment companies	FI:075 Describe types of financial-services providers (CS)	
6. Identify the characteristics of pricing, dealing, and settlement		
7. Identify and explain what Investment trusts are	PD:208 Describe trust services available to customers (SP)	
8. Demonstrate knowledge how hedge funds work	PD:314 Discuss the nature of hedge funds (SP)	

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Topic D: Stock Market	MBA Research Performance Indicators	LAPs
Task		
1. Explain how stock market benefits investors and companies	FI:337 Explain types of financial markets (e.g., money market, capital market, insurance market, commodities markets, etc.) (SP)	
2. Analyze stock tables for investment related information	FI:275 Interpret securities table (SP)	**LAP-QS-037, Table Talk (Reading Stock Tables)
3. Describe options for handling accumulated money/earnings		
4. Understand the types of investments	FI:077 Explain types of investments (CS) PD:309 Explain the nature of stocks (SP)	LAP-FI-077 Invest for Success (Types of Investments) **LAP-QS-034, Stock Up for the Future (Nature of Stocks)
5. Compare and differentiate between Primary vs secondary markets	FI:337 Explain types of financial markets (e.g., money market, capital market, insurance market, commodities markets, etc.) (SP) PD:236 Describe how securities are traded (SP)	**LAP-QS-047, Buy and Sell (How Securities Are Traded)
6. Distinguish between Bull, bear, and pig markets	PD:238 Explain causes of stock price fluctuations (SP)	**LAP-QS-040, Swing HI, Swing LO (Causes of Stock Price Fluctuations)
Topic E: Stock versus Other Investments	MBA Research Performance Indicators	LAPs
Task		
1. Demonstrate knowledge of compounding	FI:062 Explain the time value of money (CS)	
2. Explain the purpose of company		
3. Describe ethical behavior in support center.	BL:104 Discuss ethical considerations in the securities and investments industry (SP)	

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4. Understand the process of gathering relevant information	FI:274 Describe sources of securities information (CS)	**LAP-QS-036, The Source Is With You (Finding and Evaluating Securities Information)
5. Evaluate financial statements	FI:276 Explain information that can be obtained from financial statements (SP) FI:102 Interpret financial statements (MN)	**LAP-QS-038, Go Figure (Information in Financial Statements) **Just for You! FI:102, Interpret financial statements
6. Define terminology common to stock markets and other investments	FI:077 Explain types of investments (CS) PD:309 Explain the nature of stocks (SP)	LAP-FI-077 Invest for Success (Types of Investments) **LAP-QS-034, Stock Up for the Future (Nature of Stocks)
Topic F: Mutual Funds	MBA Research Performance Indicators	LAPs
Task		
1. Understanding and explaining total return		
2. Describe mutual funds and its involvement with taxes	PD:304 Describe the nature of mutual funds (SP)	**LAP-QS-035, Mutual Attraction (Nature of Mutual Funds)
3. Identify the process of purchasing mutual funds	PD:304 Describe the nature of mutual funds (SP)	**LAP-QS-035, Mutual Attraction (Nature of Mutual Funds)

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4. Explain benefits with investment in mutual funds	PD:304 Describe the nature of mutual funds (SP)	**LAP-QS-035, Mutual Attraction (Nature of Mutual Funds)
5. Understand fund costs	PD:304 Describe the nature of mutual funds (SP)	**LAP-QS-035, Mutual Attraction (Nature of Mutual Funds)
Topic G: Basics of Bonds	MBA Research Performance Indicators	LAPs
Task		
1. Demonstrate the knowledge of bond duration	PD:313 Explain the nature of bonds (SP)	**LAP-QS-033, The Name's Bond... Just Bond (Nature of Bonds)
2. Describe the process of buying bonds	PD:313 Explain the nature of bonds (SP)	**LAP-QS-033, The Name's Bond... Just Bond (Nature of Bonds)
3. Describe the process of issuing bonds	PD:313 Explain the nature of bonds (SP)	**LAP-QS-033, The Name's Bond... Just Bond (Nature of Bonds)
4. Identify the roles of collateral	PD:313 Explain the nature of bonds (SP)	**LAP-QS-033, The Name's Bond... Just Bond (Nature of Bonds)
5. Compare secured and unsecured bonds	PD:313 Explain the nature of bonds (SP)	**LAP-QS-033, The Name's Bond... Just Bond (Nature of Bonds)

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6. Introduction to government bonds	PD:313 Explain the nature of bonds (SP)	**LAP-QS-033, The Name’s Bond... Just Bond (Nature of Bonds)
7. Identify U.S. government agency bonds and savings bonds	PD:313 Explain the nature of bonds (SP)	**LAP-QS-033, The Name’s Bond... Just Bond (Nature of Bonds)
Topic H: Derivatives	MBA Research Performance Indicators	LAPs
Task		
1. Demonstrate the knowledge of Futures		
2. Demonstrate the knowledge of Options		
3. Demonstrate the knowledge of SWAPS		
4. Describe the different uses of Derivatives	PD:316 Explain the nature of derivatives (SP)	
Topic I: Financial Services Regulation	MBA Research Performance Indicators	LAPs
Task		
1. Explain Financial Services & Markets Act	BL:105 Discuss laws and regulations governing the securities and investments industry (SP)	
2. Identify Financial Crime	BL:105 Discuss laws and regulations governing the securities and investments industry (SP)	
3. Explain insider dealing and market abuse	BL:105 Discuss laws and regulations governing the securities and investments industry (SP)	
4. Describe the Data Protection Act 1998	BL:105 Discuss laws and regulations governing the securities and investments industry (SP)	
5. Identify types of Breaches, complaints, and compensation	BL:105 Discuss laws and regulations governing the securities and investments industry (SP)	

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