2025-26 Winter Term 1 UBC-V Individual Instructor Report for COMM_V 371-106 - Investment Theory (Xuhui Chen)

Project Title: **2025-26 Winter Term 1 UBC-V Instructor SEI Surveys**

Course Audience: **41**
Responses Received: **31**
Response Ratio: **76%**

Report Comments

Recommended Minimum Response Rates

Class Size	Recommended Minimum Response Rates based on 80% confidence & ± 10% margin
< 10	75%
11 - 19	65%
20 - 34	55%
35 - 49	40%
50 - 74	35%
75 - 99	25%
100 - 149	20%
150 - 299	15%
300 - 499	10%
> 500	5%

Legend

N: Invited
n: Responded

Frequency Distribution
SD: Strongly Disagree
D: Disagree

UBC Student Experience of Instruction

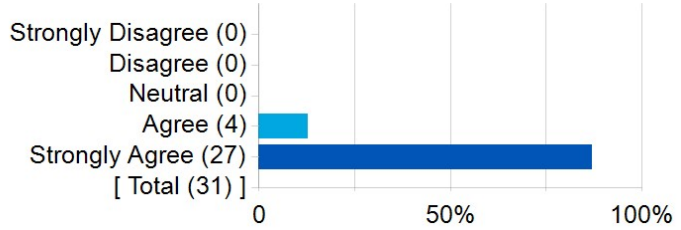
N: Neutral
A: Agree
SA: Strongly Agree

Creation Date: **Wednesday, January 7, 2026**

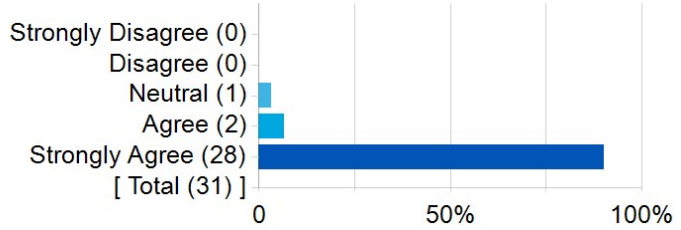
University Module Questions

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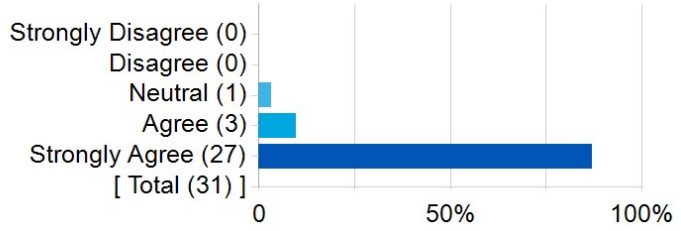
1. Throughout the term, the instructor explained course requirements so it was clear to me what I was expected to learn.



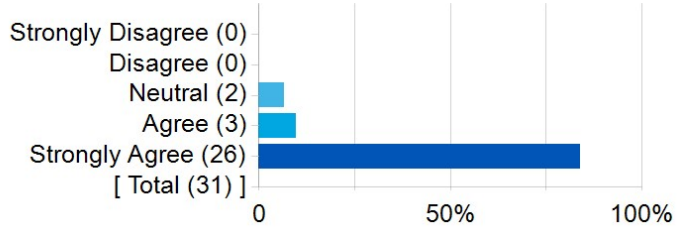
2. The instructor conducted this course in such a way that I was motivated to learn.



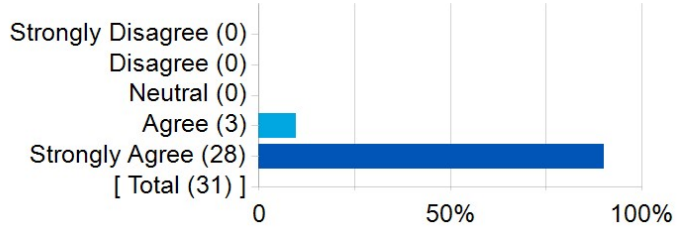
3. The instructor presented the course material in a way that I could understand.



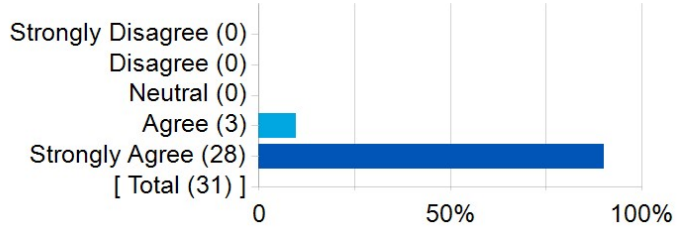
4. Considering the type of class (e.g., large lecture, seminar, studio), the instructor provided useful feedback that helped me understand how my learning progressed during this course.



5. The instructor showed genuine interest in supporting my learning throughout this course.



6. Overall, I learned a great deal from this instructor.



University Module Questions

Question	N	n	SD	D	N	A	SA	N/A	IM	PF	DI
Throughout the term, the instructor explained course requirements so it was clear to me what I was expected to learn.	41	31	0	0	0	4	27	0	4.9	100%	0.1
The instructor conducted this course in such a way that I was motivated to learn.	41	31	0	0	1	2	28	0	4.9	97%	0.1
The instructor presented the course material in a way that I could understand.	41	31	0	0	1	3	27	0	4.9	97%	0.1
Considering the type of class (e.g., large lecture, seminar, studio), the instructor provided useful feedback that helped me understand how my learning progressed during this course.	41	31	0	0	2	3	26	0	4.9	94%	0.2
The instructor showed genuine interest in supporting my learning throughout this course.	41	31	0	0	0	3	28	0	4.9	100%	0.1
Overall, I learned a great deal from this instructor.	41	31	0	0	0	3	28	0	4.9	100%	0.1

Faculty Questions

Course Questions

Question	N	n	SD	D	N	A	SA	N/A	IM	DI
The textbook or other assigned readings were important for understanding the course.	41	31	2	2	5	6	5	11	3.7	0.7
The notes and readings prepared by the instructor were useful.	41	31	0	0	1	6	23	1	4.8	0.2
The course assignments provided a useful learning experience.	41	31	0	0	4	11	16	0	4.5	0.4
I would recommend this course to other students.	41	31	1	1	3	6	20	0	4.7	0.5
I found the workload in this course to be heavy.	41	31	2	6	14	7	2	0	3.0	0.5
I found this course to be difficult.	41	31	1	4	13	8	5	0	3.3	0.5

Question	%Favourable
The textbook or other assigned readings were important for understanding the course.	55%
The notes and readings prepared by the instructor were useful.	97%
The course assignments provided a useful learning experience.	87%
I would recommend this course to other students.	84%
I found the workload in this course to be heavy.	29%
I found this course to be difficult.	42%

Open ended feedback

Do you have any suggestions for what the instructor could have done differently to further support your learning?

Comments
I like the review session.
I don’t think any changes are necessary, as the current approach works very well.
Loved him, showed genuine care for his first time ever teaching – deserves a full–time teaching role solely based on his compassion when it comes to teaching.
Nothing much, overall a great instructor and leaves a hugely positive impression.
Percy did a great job teaching us. He showed a genuine desire to help us achieve success and always stopped to make sure we understood everything before moving forward.
he's awesome and super sweet and helpful, very very approachable!
N/A
Nothing he could have done differently, Percy was amazing!
He was very good and engaging during lectures.
N/A
I do not have any suggestions for my instructor, he did a really good job on teaching me
na
No I don't think there was more he could've done because I think Xihui did an amazing job this semester.
I loved Percy's teaching style! I don't have any recommendations for improvements.
For the later half of the course, I believe more real–life examples would've been beneficial. The first half was full of these examples and they really helped me understand concepts I wasn't familiar with. However, I believe Percy didn't do so not because he didn't want to but because of time constraint.
I felt that the speed of the teaching was a bit too accelerated.
all good for me
n/a
I'm very happy with how Percy taught the class.
NA

Please identify what you consider to be the strengths of this course.

Comments
The instructor is responsible, and answers our quetions.
Very theoretical course, learned a lot about investing in securities.
This course has several notable strengths. It offers a thorough introduction to investing, giving students both a broad qualitative understanding of how markets operate and a clear grasp of the numerical mechanisms behind them. The course structure is effective: it features ten well–organized lectures, each devoted to a key area of investment theory. Students also benefit from the numerous practice quizzes available on Canvas, and the slides are clear and concise, making them easy to follow. Overall, the course is highly valuable because it builds a strong foundation in how asset markets work and how major securities such as bonds, stocks, and derivatives are priced. By blending essential theory with real–world evidence and applications, it equips students with meaningful skills and knowledge for future investment studies and career paths.
Compassionate, Charismatic lecturer
GPA booster.
Great material examples, real life links, a lot of relying on what is used in terms of our prospective careers. Great willingness to help, active participation in class engagement. I loved showing up and being active in the class, had great motivation throughout the term.
the course is really nice it goes more in depth and into the detail of financial concepts instead of just surface level, especially derivatives + options.
Very good at teaching. Clear, engaging and fun
The structure of the course is well designed
The material is very interesting and light on math. Helps develop a strong intuition rather than just memorizing formulas.
All perfect
amazing instructor
I think having practice quizzes and questions made it a lot easier to digest the content because I found that just reading off slides and listening wasn't enough for it to make sense to me.
This course felt very applicable for personal investment strategies as well as in the wealth management space.
It teaches applicable financial knowledge regardless of what finance/non–finance role we end up in.
Preparing us with foundational theoretical valuations.
The practice materials such as quizz and the midterms practice are closely related to the actual evaluated components.
Very detailed slides, clear course requirements
really easy and clear to understand, so friendly and warmhearted always willing to help students with any questions with patience.
The instructor explained the course content very clearly and understandably. It is very easy for people to understand complex knowledge. And the content is very practical.
having quizzes, forces us to keep up with material.
This course is a nice step up from COMM 298, and it's important since many of us have a portfolio of stocks. It's important to understand the fundamentals of markets, different types of assets, and other factors.
The lectruer was being very supportive through out the term which I truly appreciate his patience. And held extra office hours for any questions, which was super helpful.

Please provide suggestions on how this course might be improved.

Comments
The course is excellent overall, though one small enhancement could be adding more video walkthroughs of challenging practice–quiz questions. At times, lectures focus heavily on conceptual explanations and formula derivations, leaving slightly less room for applied examples. While I sincerely appreciate the in–class practice sessions before each graded quiz, providing additional TA–led tutorial videos on Canvas would make it even easier for students to review problem–solving steps at their own pace.
N/A
No complaints
N/A
N/A
na
More practice questions available.
I would have appreciated more practice material for the exams!
No suggestions. I believe the course and grading structure is well–crafted.
Adding more emperical examples to show how the theory can be applied to real world examples.
More practice midterms and quizzes. I would also have liked more links to the textbook and what specific practice exercises in the texbook I should do instead of just having chapters numbers.
More practice questions, more support for those questions, better TA tutorials, videos posted on Canvas explaining concepts
all good for me
have the slides be more dense, similiar to the comm 370 course. not explain proofing if it's not neccessary. have more practice quizes and have the tutorial sessions to be more than explaining the practice quiz but a comprehensive review of the week's material.
I think there should be clear distinctions between this course and COMM 370. There are many similar concepts taught in the classes and it can be confusing, especially when we are studying for midterms.
NA

Please comment on aspects of my teaching which you have found particularly effective as well as on those aspects which might be improved. You may wish to comment on areas such as classroom delivery, class discussions, interaction with students, availability outside class and overall interest in students.

Comments
The review session is so helpful, we can understand how to apply these knowledge to the questions.
I really enjoy the prof’s class, he keeps the class engaged and tells a joke here and there to make the class less “boring”. The prof showed genuine interest in the students and holds review sessions to better help us understand the course concepts and how to apply them to questions.
Overall, I think the Professor Chen did a fantastic job delivering engaging and interesting lectures. He explained complex material clearly and broke down difficult concepts into manageable, intuitive pieces. His classroom delivery was excellent because he spoke clearly, provided on–the–spot examples to reinforce new ideas, and used both the slides and the whiteboard/iPad notes app to walk through graphs, formula derivations, and problem–solving steps. This approach further strengthened my understanding of the material, especially in the classes leading up to the end of the semester. Furthermore, Professor Chen consistently facilitated engaging in–class discussions, often connecting financial concepts to real–world situations (e.g., buyer–seller interactions, pension fund mechanics, etc). This was incredibly helpful because it showed students how textbook financial principles apply in real–world situations. I also found his annotated notes extremely useful. After each topic, he shared detailed notes with his students. These notes expanded on the slides and concluded with concise summaries of the key

Comments
takeaways, which I found to be invaluable for studying. In addition, he was always eager to support students, as he regularly set aside lecture time to work through challenging quiz questions as a class. He also showed genuine care for our learning by letting students vote on where to focus class time to prepare effectively for the exam and maximize their understanding. Additionally, he was very accommodating with office hours and always willing to offer extra help when needed. I also appreciated his quick email responses. Ultimately, Professor Chen has a real talent for teaching. His delivery clarity, passion for the subject, and dedication to students made a challenging course very rewarding. I learned a great deal from him and truly enjoyed the lectures.
Flexible office hours
Great teaching style, sounds excited and genuinely interest in teaching the course content. Super effect was going the extra mile and explaining each concept in detail, as well as walking through example questions as well as notes. Instructor honestly went above and beyond by providing own annotations and work throughs in addition to the lecture slides
His lectures were very clear. His passion for teaching is obvious.
Examples on examples, extremely helpful. Giving students time to solve by themselves before going over it together. Every aspect of teaching was strong.
He's very approachable, and takes out time to clear doubts, extremely nice and teaches very very well. we can see how passionate he is!!!
All very helpful. The content made sense and I appreciated Professor Chen walking students through practice problems as it made the content a lot more applicable and understandable.
Very genuine professor who tries to help students.
1) You provided real–world examples alongside the topics you covered, which really helped me develop a better understanding of the fundamental principles. 2) You demonstrated a genuine interest in your students' learning and success, motivating me to work harder in this course.
My instructor give us a lots of examples of what we learned, not just simply concepts of the course. I think he explains these example and concepts very well and clearly. These examples really helped me to have a better understanding of the course concepts.
To be quite candid, I found the content of the course difficult but the way he taught the materials, went through examples, was interactive, and was always happy to answer any questions we had. You could tell from his delivery and how he lectured that he was very passionate about the topic, very engaged and wanted to be here which in turn made class time so much better for us students. I was personally going through a rough patch at home which affected my attendance, and he not only noticed but was incredibly kind in supporting my learning in a compassionate and meaningful way that really helped me through this semester, not only through this class.
Percy, you did a fantastic job! I appreciated your fast–paced teaching style, which left enough room to solidify class concepts in your booster sessions. Every class you brought enthusiasm and positivity, which helped me feel more engaged and ready to learn!
I appreciate how you always take some time to discuss some real–life, applicable examples to each topic. As someone who isn't familiar with a lot of the concepts discussed in 371, this has been very useful for me. You also interact with the students in a friendly and approachable way without being too lenient. You show how much you care about us doing well in this course in many ways, and that's really rare to find, especially considering you're a PhD student rather than an experienced instructor. I learnt a lot and I feel very grateful I got to take this class with you!
I liked the enthusiasm for teaching, but I felt the pace was a little too fast. Also, I would have prepared the notes to be filled out from the beginning, so I could reference them as they were being explained.
The instructor always came to class with a positive attitude and a smile on his face. It made me motivated to learn during class time. His positivity radiates in the classroom. Even thought it was his first time teatching, he was really comfortable with it. He also broke down complex topics in a way that was easy to understand. The examples he provided in class were really useful. It was a great addition to the slides that were a bit less specific and detailed in terms of examples.
Very knowledgeable on all topics and always had enthusiasm when teaching. Made the class excited to learn and kept the lessons engaging and fun. Provided personal notes, which helped us solve problems at home. Wanted us to succeed.
In my mind, i think all aspects are very effective, especially explain the course in a really clear way and make it much easier for us. Even have the review session for every practice

Comments
quiz question to help up well prepared for the graded quiz, midterm, and final. I think Percy is really good at teaching and do really well in communicating and connecting with students. one of my favorite instructors in Sauder.
He can explain very complex knowledge very clearly and logically, making it easy for people to understand. After class, he was very patient in helping students answer their questions.The class content is also very practical.
Percy always created a lively and engaging environment in class. He gave useful tips to study the material better and genuinely wanted us to develop a robust understanding of the subject.
good at teaching intuitively. giving up time to review the material. giving practice questions to help understand the material better. able to give his time for us to ask lots of questions outside of the class time.
– Very friendly – Always willing to help – Supportive whenever we had doubts – Would always reinforce his love for teaching.
He takes notes for us, and guide us through very useful practical questions solutions

Please comment on the course. Indicate elements which you have found particularly effective or which you feel I could improve upon, e.g., the reasons for any low/high ratings you have given. Be specific. You may wish to comment on such areas as topics and scope of material covered, readings, exams and assignments and whether or not your interest in the area has been stimulated.

Comments
The course structure was well suited for an upper–year mandatory finance class focused on investment theory. The practice quizzes were helpful and accurately reflected the difficulty of the five graded quizzes and the midterm. The light workload made sense, as mastering the material requires self–directed study and regular review. Although the textbook was not emphasized, the lecture material and slides were comprehensive enough for students to develop a strong grasp of the concepts. While we did not cover swaps in detail, I believe the overall scope of the course was extensive; we explored bonds, futures, forwards, and options in depth, including their pricing, hedging applications, and associated risks. The lecture slide packages were clearly organized and easy to follow, especially for longer topics that required multiple slides, and their chronological layout aided comprehension and readability. Some mathematical notations were challenging at times, however. As mentioned previously, I believe that additional video explanations of difficult problem–solving steps would further support students, given the demanding nature of certain questions. Overall, the course had a coherent structure, well–written materials, and helpful feedback from the instructor, all of which contributed to a positive learning experience. Throughout the term, I felt motivated to study/engage with the content and explore many of the topics beyond what we covered in class.
N/A
Course content and difficulty level should be increased.
N/A
na
I belive the quizzes are well spaced out, and the content is not too much to study for. Overall a great content balance.
Little opportunities to learn content or review before exams, other than the lecture slides. Some other quantitative courses I have taken have a better module system with more practice problems and review videos. I constantly found myself going to YouTube or other outlets to deepen my understanding, as just the slides and lecture were not enough to reinforce. The tutorials were not effective and were very unclear. They were poorly organized with no slides, and just went over the very few practice problems posted.
In my mind, i think all aspects are very effective, especially explain the course in a really clear way and make it much easier for us. Even have the review session for every practice quiz question to help up well prepared for the graded quiz, midterm, and final. I think Percy is really good at teaching and do really well in communicating and connecting with students. one of my favorite instructors in Sauder.
The class content is very interesting, not boring and highly practical.

Explanatory Note

The reported metrics are as follows:

1. Percent Favourable Rating

This is the percentage of respondents who responded with a 4 or 5 (Agree or Strongly Agree) on a scale of 1 to 5.

2. Interpolated Median

The data collected for Student Experience of Instruction (SEI) are ordinal in nature, with a natural order (from 1 to 5). The usual measure of central tendency for ordinal data is the median (50% percentile). The Interpolated Median (IM) is an adjusted median that considers the number of responses less than the median, greater than the median and equal to the median. As such, IM reflects the distribution of students' responses.

Consider the following example:

Frequency Distribution

Response for University Module Item	Section 1	Section 2
5 = Strongly agree	5	5
4 = Agree	3	5
3 = Neither agree nor disagree	6	0
2 = Disagree	1	2
1 = Strongly disagree	0	1
Mean	3.8	3.8
Median	4.0	4.0
Interpolated Median	3.7	4.2
Percent favourable rating	53%	77%

3. Dispersion Index

The dispersion Index is a measure of variability suitable for ordinal data (Rampichini, Grilli & Petrucci 2004). This dispersion index has values between zero and 1. A zero dispersion index indicates that all students in the section gave the same rating. An index value of 1.0 is obtained when the class splits evenly between the two extreme values (Strongly Disagree & Strongly Agree), a very rare occurrence. In SEI data at UBC, the index rarely exceeds 0.85, and mostly for evaluations not meeting the recommended minimum response rate.