

Course Specifications

Course Title:	Investment Analysis and Portfolio Management
Course Code:	FIN551
Program:	Master of Business Administration (MBA)
Department:	Finance
College:	College of Business (CBA)
Institution:	Prince Sultan University

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A. Course Identification

1. Credit hours: 3			
2. Course type			
a.	University <input type="checkbox"/>	College <input type="checkbox"/>	Department <input type="checkbox"/>
b.	Required <input type="checkbox"/>	Elective <input type="checkbox"/>	Others <input type="checkbox"/>
3. Level/year at which this course is offered: 2			
4. Pre-requisites for this course (if any): FIN550			
5. Co-requisites for this course (if any): NA			

6. Mode of Instruction (mark all that apply)

No	Mode of Instruction	Contact Hours	Percentage
1	Traditional classroom	39	87%
2	Blended		
3	E-learning	6	13%
4	Correspondence		
5	Other		

7. Actual Learning Hours (based on academic semester)

No	Activity	Learning Hours
Contact Hours		
1	Lecture	45
2	Laboratory/Studio	
3	Tutorial	0
4	Others (specify)	
	Total	
Other Learning Hours*		
1	Study (3 credit hours 1.5hrs SLT per week X 12 weeks)	54
2	Assignments/Tutorials (1.5 hours per chapter)	16.5
3	Library	24
4	Projects/Research Essays/Theses	25
5	Others (specify)	
	Total	120

* The length of time that a learner takes to complete learning activities that lead to achievement of course learning outcomes, such as study time, homework assignments, projects, preparing presentations, library times

B. Course Objectives and Learning Outcomes

1. Course Description

This course provides students with a solid foundation in theories and methods of portfolio management. It provides an overview of the operation of the securities markets and the mechanics of trading securities. This course focuses on common stock, the stock market, and approaches to investing in the stock market and building stock portfolios. Particular emphasis is given to three competing approaches to stock investment: fundamental analysis, technical analysis and efficient market analysis. To optimize the skills, students will be exposed to modern portfolio theory which include risky asset allocation, portfolio performance and introduction to futures and options market.

2. Course Main Objective

The objective of the course is to examine various concurrent theories of investment portfolio management that integrates the global market. It is intended to serve advanced level students who are interested in more in-depth analysis of the investment market instrument and the balance between return and risk management. The course is more analytical and practical in nature and exposes the student to case studies and the real practice of market trading and examining actual companies' financial data. Among the topics to be covered are, behavioral finance and anomalies, technical analysis, Risky asset allocation, Passive versus active management techniques in managing the portfolio, and to complete the knowledge we also teach students to introduction of derivatives markets. For more practical, we expose students using real hands-on application of trading in the security market through Tadawul simulation and Bloomberg terminal.

3. Course Learning Outcomes

CLOs		Aligned PLOs
1	Knowledge:	
1.1	CLO 1: To explain comprehensive, coherent and systematic body of knowledge related to investment background, portfolio construction and portfolio management	LG1: Advanced Business Knowledge
2	Skills :	
2.1	CLO2: Ability to apply the general concepts of Investment, portfolio management and derivatives market	LG5: Global Perspective
2.2	CLO 3: Ability to construct efficient frontier and optimized portfolio with the skills to evaluate portfolios and fund's manager performance	LG3: Integration Skills
2.3	CLO 4: Evaluate equity selection by using fundamental and technical analysis in order to form efficient portfolio	LG3: Integration Skills
3	Competence:	
3.1	CLO 5: Appraise portfolios and fund's manager performance	LG3: Integration Skills

CLOs		Aligned PLOs
3.2	CLO 6: Demonstrate good communication, numerical and analytical skills through project and assignment as well as classroom discussions for local and global issues.	LG2: Communication skills
3.3	CLO 7: Apply range of databases, financial portals and online simulations for portfolio management.	LG3: Integration Skills

C. Course Content

Week	List of Topics	Contact Hours
1	Introduction to Investment	3
2	Security market and Transaction	3
3	Risk and return of complete portfolio	3
4-5	Optimal Risky Asset Allocation	6
6	Major 1	3
7	Macroeconomics and Industry Analysis (Fundamental) (Project will start)	3
8	Behavioral and Technical Analysis	3
9	Efficient Market Hypothesis	3
10	Major 2	3
11	Portfolio Performance Evaluation	3
12	Introduction to Derivatives market (a) Options Market (Close position for project)	3
13	(b) Futures Market	3
14	Project Presentation	3
15	Final Exam	3
Total		45

D. Teaching and Assessment

1. Alignment of Course Learning Outcomes with Teaching Strategies and Assessment Methods

Code	Course Learning Outcomes	Teaching Strategies	Assessment Methods
1.0	Knowledge		
1.1	CLO 1: To explain comprehensive, coherent and systematic body of knowledge related to investment background, portfolio construction and portfolio management	In-class discussion, end-of-chapter questions, group work assignment, case study	Examinations – essay type, MCQs and case analysis, group-work project Written report and presentation
2.0			
2.1	CLO2: Ability to apply the general concepts of portfolio management and derivatives market	In-class discussion, end-of-chapter questions, group work	Examinations – essay type, MCQs and case analysis, group-work project

Code	Course Learning Outcomes	Teaching Strategies	Assessment Methods
		assignment, case study	Written report and presentation
2.2	CLO 3: Ability to construct efficient frontier and optimized portfolio with the skills to evaluate portfolios and fund's manager performance	In-class discussion, end-of-chapter questions, group work assignment, case study	Examinations – essay type, MCQs and case analysis, group-work project Written report and presentation
2.3	CLO 4: Evaluate equity selection by using fundamental and technical analysis in order to form efficient portfolio	In-class discussion, end-of-chapter questions, group work assignment, case study	Examinations – essay type, MCQs and case analysis, group-work project Written report and presentation
3.0			
3.1	CLO 5: Appraise portfolios and fund's manager performance	In-class discussion, end-of-chapter questions, group work assignment, case study	Examinations – essay type, MCQs and case analysis, group-work project Written report and presentation
3.2	CLO 6: Demonstrate good communication, numerical and analytical skills through project and assignment as well as classroom discussions for local and global issues	In-class discussion, end-of-chapter questions, group work assignment, case study	Examinations – essay type, MCQs and case analysis, group-work project Written report and presentation
3.3	CLO 7: Apply range of databases, financial portals and online simulations for portfolio management.	Students are using online stocks trading by using real everyday prices to develop their portfolio and trading stocks selection/BMC/ excel. (Group project/assignment using excel/BMC)	Written report and presentation

2. Assessment Tasks for Students

#	Assessment task*	Week Due	Percentage of Total Assessment Score
1	Major 1 (exam)	25 th Feb, 2020	20%
2	BMC/Excel Assignment/Case study	28 th March, 2020	15%
3	Project	14 th April, 2020	25%
4	Final Examination	Week 16	40%

*Assessment task (i.e., written test, oral test, oral presentation, group project, essay, etc.)

E. Student Academic Counseling and Support

Arrangements for availability of faculty and teaching staff for individual student consultations and academic advice :

Sunday: 10-12pm, Monday: 11-12pm, Tuesday: 5-6pm. Thursday: 10-11pm

F. Learning Resources and Facilities

1. Learning Resources

Required Textbooks	1. Investments, Bodie, Kane & Markus, Investments, 10th Ed. McGraw Hill. Recommendation: work with the textbook companion Web site: www.mhhe.com/bkm
Essential References Materials	1. Essential of Investments, Bodie, Kane and Marcus, 9 th Edition. McGrawhill – supplement 2. Fundamental of Investing, Smaer, Gitman and Joehnk, 13 th Edition, Pearson. 3. Investment Analysis and Portfolio Management, Reilly and Brown, Thompson-South Western.
Electronic Materials	Multimedia with PC
Other Learning Materials	a. Lecture room b. Whiteboard

2. Facilities Required

Item	Resources
Accommodation (Classrooms, laboratories, demonstration rooms/labs, etc.)	Lecture room Whiteboard Bloomberg Terminal

Item	Resources
Technology Resources (AV, data show, Smart Board, software, etc.)	Smart board
Other Resources (Specify, e.g. if specific laboratory equipment is required, list requirements or attach a list)	www.Tadawul.com ; www.google.com/finance www.finance.yahoo.com ; www.investopedia.com

G. Course Quality Evaluation

Evaluation Areas/Issues	Evaluators	Evaluation Methods
Final Exam Questions	Assigned instructors	Moderating
Teaching assessment	Assoc. chair	Teaching observation
Student evaluation	Students	Survey questions at the end of the semester.
Course exit survey	Instructors	CLO

Evaluation areas (e.g., Effectiveness of teaching and assessment, Extent of achievement of course learning outcomes, Quality of learning resources, etc.)

Evaluators (Students, Faculty, Program Leaders, Peer Reviewer, Others (specify))

Assessment Methods (Direct, Indirect)

H. Specification Approval Data

Council / Committee	
Reference No.	
Date	