



## Course Specifications

<b>Course Title:</b>	<b>Investment Portfolio Management</b>
<b>Course Code:</b>	<b>FIN420</b>
<b>Program:</b>	<b>Bachelor - Finance</b>
<b>Department:</b>	<b>Finance</b>
<b>College:</b>	

	<b>College of Business Administration (CBA)</b>
<b>Institution:</b>	<b>Prince Sultan University (PSU)</b>

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## A. Course Identification

<b>1. Credit hours: 3</b>
<b>2. Course type</b>
a. University <input type="checkbox"/> College <input checked="" type="checkbox"/> Department <input type="checkbox"/> Others <input type="checkbox"/>
b. Required <input type="checkbox"/> Elective <input checked="" type="checkbox"/>
<b>3. Level/year at which this course is offered:</b>
<b>4. Pre-requisites for this course (if any): FIN 320</b>
<b>5. Co-requisites for this course (if any): NA</b>

### 6. Mode of Instruction (mark all that apply)

No	Mode of Instruction	Contact Hours	Percentage
1	Traditional classroom	45	100%
2	Blended	NA	NA
3	E-learning	NA	NA
4	Distance learning	NA	NA
5	Other	NA	NA

### 7. Contact Hours (based on academic semester)

No	Activity	Contact Hours
1	Lecture	45
2	Laboratory/Studio	NA
3	Tutorial	NA
4	Others (specify)	NA
	<b>Total</b>	<b>45</b>

## B. Course Objectives and Learning Outcomes

### 1. Course Description

An analysis of quantitative and qualitative factors affecting the value of financial securities: earnings expectations, required rate of return, uncertainty, and investors attitude. Fundamental and technical approaches, timings, and screening are analyzed. Applications of alternative valuation techniques have also been considered. Also, rigorous outline of the modern portfolio theory and portfolio construction with relation to requirements of individuals and institutions is emphasized.

### 2. Course Main Objective

The objective of the course is to familiarize the participants with the stock markets across world, its terminology, types of securities, determinants of the price behavior of securities, evaluation of fair price, and to provide a conceptual insight to the valuation of securities. It will also help students to improve decision-making skills in management of financial assets through a better understanding of modern portfolio theories management and capital markets' functioning.



### 3. Course Learning Outcomes

CLOs		Aligned PLOs
<b>1</b>	<b>Knowledge and Understanding</b>	
1.1	Identify how to construct and manage a collection of investments	PLO1
<b>2</b>	<b>Skills :</b>	
2.1	Analyze the process of portfolio management and security valuation.	PLO2
2.2	Evaluate equity by using fundamental and technical analysis in order to form optimized portfolios.	PLO2
2.3	Apply range of databases, financial portals and online simulations for portfolio management.	PLO3
	Demonstrate good communication and numerical skills primarily through assignments as well as classroom discussions and report writing.	PLO4a, PLO4b
<b>3</b>	<b>Values:</b>	
3.1	Appraise portfolios and fund's manager performance.	PLO5b

### C. Course Content

No	List of Topics	Contact Hours
1	Investment environment and current issues in Financial Market	3
2	Securities Trading	3
3	Risk and return and Modern Portfolio Theory	3
4	Efficient diversification	6
5	Equity valuation tools	3
6	Fundamental Analysis and Macroeconomic Variables	6
7	Security Screening and Technical Analysis	6
8	Bond pricing and selection	3
9	Efficient Market Hypothesis and CAPM	3
10	Performance Evaluation	6
11	Investment policy and objectives	3
<b>Total</b>		<b>45</b>

### D. Teaching and Assessment

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

Code	Course Learning Outcomes	Teaching Strategies	Assessment Methods
<b>1.0</b>	<b>Knowledge and Understanding</b>		
1.1	To describe comprehensive, coherent and systematic body of knowledge related to investment background, portfolio construction and portfolio management	<ul style="list-style-type: none"> <li>Lectures, readings,</li> <li>end-of chapters questions, case discussion</li> </ul>	<ul style="list-style-type: none"> <li>Examination and class discussions</li> </ul>
<b>2.0</b>	<b>Skills</b>		
2.1	Explain the general concepts, principles and theories in securities analysis and portfolio management	Numerical sets of problem, critical and analytical set of	Examinations – essay type, MCQs



Code	Course Learning Outcomes	Teaching Strategies	Assessment Methods
2.2	Ability to apply insights in new issues and problems in selecting securities and managing portfolios.	questions, individual and group projects	and case analysis, group-work project
2.3	Create awareness in new issues relating to changes in economic and able to apply insight from studies in analyzing those issues		
<b>3.0</b>	<b>Values</b>		
3.1	Students demonstrate responsibility for own learning; takes initiative and work with guidance in academic studies and other aspects of personal development; can be relied upon to complete assigned tasks with limited supervision and works effectively towards common goal in-group situations.	In-class discussion, end-of-chapter questions, group work assignment	Group project and critical analyses
3.2	Students demonstrate effectively use basic information and computer technology and numerical skills in resolving problems through discussions, team or group work; communicates effectively both verbally and in writing.	In-class problem solving tutorials, group assignments. Students are using online stocks trading by using real everyday prices to develop their portfolio and trading stocks selection.	Written assignments and presentations

## 2. Assessment Tasks for Students

#	*Assessment task	Week Due	Percentage of Total Assessment Score
1	Major 1	W7	15%
2	Assignment	W8	5%
3	Major 2	W12	20%
4	Project Submission and Presentation	W14	20%
5	Final Examination	Final Period	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:

The instructor allocates 4 hours of face-to-face meeting per week to discuss problems encountered by the students. Instructor also makes use of emails as a medium of communication with the students. Other than that, the instructor also acts as an advisor to the advisees giving advise related to academic matters for instances: course registration and others. At the university level, there are adequate tutorial assistance and academic counseling to assist students with academic problems.



## F. Learning Resources and Facilities

### 1. Learning Resources

<b>Required Textbooks</b>	<ul style="list-style-type: none"> <li>• Essential of Investment by Bodie, Kane and Marcus, (10th edition or latest edition)</li> <li>• Investment by Bodie, Kane and Marcus 10th edition, McGraw Hill</li> </ul>
<b>Essential References Materials</b>	Business Week, Financial Times, WSJ
<b>Electronic Materials</b>	<ul style="list-style-type: none"> <li>• Gitman and Jolhnk. Fundamentals of Investing (Latest edition).</li> <li>• Health and Azima. Contemporary Investments, (Latest edition) Dryden press.</li> <li>• Amling and Droms. Investment Fundamentals, (Latest edition) Dryden Press</li> <li>• Mayo. Investment: An Introduction, (Latest edition). Dryden Press.</li> <li>• Fabozzi, Investment Management, (Latest edition) Prentice Hall.</li> </ul>
<b>Other Learning Materials</b>	Datastream and Bloomberg Professional Services, Investopedia Simulation game, Kahoot online investment game.

### 2. Facilities Required

Item	Resources
<b>Accommodation</b> Classrooms, laboratories, demonstration) (.rooms/labs, etc)	<ul style="list-style-type: none"> <li>• Size of classroom must occupy maximum up to 25 students</li> <li>• Classroom with projector, computer, whiteboard, internet or WIFI</li> </ul>
<b>Technology Resources</b> AV, data show, Smart Board, software,) (etc)	<ul style="list-style-type: none"> <li>• Internet access, Smart-Board</li> </ul>
<b>Other Resources</b> Specify, e.g. if specific laboratory) equipment is required, list requirements or (attach a list)	<ul style="list-style-type: none"> <li>• NA</li> </ul>

## G. Course Quality Evaluation

Evaluation Areas/Issues	Evaluators	Evaluation Methods
Achievement of CLOs	Students	Course Exit Survey
Effectiveness of teaching	Students	Course Satisfaction Survey

**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

<b>Council / Committee</b>	
<b>Reference No.</b>	
<b>Date</b>	

