Module Specification

Module Summary Information

1	**Module Title**	Investment and Portfolio Management
2	**Module Credits**	20
3	**Module Level**	6
4	**Module Code**	FIN6030

5	**Module Overview**

This module will introduce you to investment and portfolio management. The contents of the module cover exciting topics such as fundamental and technical analyses, modern portfolio theory and performance evaluation. You will learn about different asset classes for investment and how to create and manage and investment portfolio. It will enable you to learn how to forecast investment returns and the estimate stand-alone as well as portfolio risk. The module will provide you an opportunity to put finance and investment theory into practice through application of the underlying concepts to investments in financial markets. You will require extensive use of the Trading Room and Datastream Eikon for investment analysis and portfolio management throughout the term particularly for the completion of the coursework.

Knowledge and understanding of different investments, technical and fundamental analysis and portfolio management are among the essential requirements for careers in trading, fund management and investment advisory services in the financial sector. Therefore, this module enables you to acquire the knowledge and skills required for careers in the financial services industry.

The module will be delivered on a weekly schedule of 4 contact hours. There will be a 2 hour seminar lecture each week which will introduce you to the underlying concepts, tools and techniques of investment analysis and portfolio management. The seminars will enable you to understand the contents of the module. The seminar will be followed by a 2 hour workshop each week that will allow you to apply and practice the relevant concepts and theories using numerical exercises and small case studies.

The module will be assessed by 80% coursework and 20% unseen exams. The coursework and unseen exams elements of the assessment will measure your achievements of the module outcomes. These are designed to develop your knowledge and skills in investment analysis and portfolio management. You will receive feedback on all these elements of assessment from the module team.

The module will have its own Moodle site to fully support delivery of the module and will contain all the learning materials for the module as well as other resources and links. Some contents on the site will be interactive and will require you to engage with them on regular basis throughout the term.

6	Indicative Content

- Portfolio Management: An Overview
- Portfolio Risk and Return
- CAPM and EMH
- Basics of Portfolio Planning and Construction
- Approaches to Fund Management
- Technical Analysis
- Pricing, Liquidity, Fair Value and Transaction Costs
- Investment Management Principles – Fixed Income
- Investment Products, Hedge Fund and Private Equity Funds
- Investment Performance Measurement and Attribution Analysis

7	Module Learning Outcomes On successful completion of the module, students will be able to:	
	1	Estimate the risk & return of investment in different asset classes for an investment portfolio.
	2	Construct investment portfolios applying different investment concepts and theories to achieve set investment goals.
	3	Assess portfolio performance by measuring investment performance and attribution analysis.

8 Module Assessment			
Learning Outcome			
	Coursework	Exam	In-Person
1, 2, 3	X	X	

9 Breakdown Learning and Teaching Activities	
Learning Activities	**Hours**
Scheduled Learning (SL) includes lectures, practical classes and workshops, peer group learning, Graduate+, as specified in timetable	48
Directed Learning (DL) includes placements, work-based learning, external visits, on-line activity, Graduate+, peer learning, as directed on VLE	48
Private Study (PS) includes preparation for exams	104
Total Study Hours:	200