Module code	FIN7F4	Level	7
Module title	Investments and Portfolio Management	Credit value	20
Common/Core/Elective	Core	ECTS Credits	10
		Notional learning hours	200
Courses on which the module is taught	MSc Finance, Investment and Wealth Management MSc Finance and Financial Technology MSc Finance and Private Equity MSc Finance and Real Estate Investment	Teaching Period	Autumn

1. Module description

This module provides a comprehensive coverage of basic theories, applications and decision- making rules in financial investments. In particular, the course will focus on the investment decision making process, and especially the theoretical basis and practical approaches to managing investment portfolios of financial assets. This knowledge is crucial as individuals and portfolio managers should have the ability to handle efficiently the tools needed to select assets, manage risk and construct optimal portfolios. On completion, you should have the capacity for a career in investment management, financial analysis, financial planning and portfolio management.

Aims Summary:
- Enable you to have an insight into the techniques used in investment analysis and how they can be applied in real world situations by considering diversity and ethical issues and implications;
- Broaden your thinking skills relating to the concepts of finance and how they are deployed to the making of investment decisions;
- Develop your analytical skills of risk and return, diversification, CAPM / APT, fixed income, equity valuation models, portfolio performance and other related topics to investment analysis;
- Interpret and make investment decisions based upon an informed, ethical and critical approach.
- Evaluate the effect of risk on investment decisions.
- Analyse the gains from diversification and asset allocation using spreadsheet software.
- Develop an integrated portfolio management plan including equities, fixed income assets and alternative investments reflecting the goals, risk tolerance, and circumstances of individual and institutional investors.

- Appraise portfolio performance using appropriate methodologies.

2. Learning outcomes

Collaboration (LO1)
Lead and negotiate professional networks to solve challenges in complex and ambiguous financial investment situations.

Decision-making (LO04)
Formulate informed investment decisions in complex situations using critical and reflexive thinking.

Discipline Skills (LO8)
Combine and employ advanced financial knowledge, investment techniques and tools for practical purposes.

Interdisciplinary Perspectives (LO9)
Integrate different disciplinary approaches in proposing insights into multifaceted, complex portfolio and financial investment scenarios.

3. Learning and teaching methods

The teaching and learning will focus on the development of your "critical thinking" applied to topics in investment analysis and portfolio management. This will be combined with how to apply the theory into practice. The main aim is to prepare you for the real financial world and show you how to apply finance concepts with the help of spreadsheet software.

This module incorporates a variety of educational methods including spreadsheet training workshops, web-based sources and the professional financial platforms. In addition, some case studies are presented and discussed in class with group discussions, that will enable you analyse, evaluate, organise, and communicate an financial investment portfolio and simulate various economic scenarios to forecast future performance. You will be trained to search and analyse relevant financial data be able to be to create, critically analyse and actively manage a financial Investment portfolio.   You will be exposed the various asset pricing models and how these are applied in current market conditions.

Learning hours	
Directed learning	**48 hours**
Workshops/ seminar classes	48
Guided/Self-guided learning	**152 hours**
Total	200

4. Assessment, formative feedback and relative weightings

Assessment 1 –Video blog- Group Presentation

Weight (%): 50%

Word Count or Equivalent: 20 minutes

In small groups you are required to produce a professional video blog for an investment client following a specific set of guidelines. You need to produce a financial investment portfolio for your investor. You are required to analyse the currents financial markets, build a portfolio of selected stocks following a clear investment strategy. You will need to demonstrate technical, numerical and personal skills to optimize the best risk vs return option and demonstrate that your designed portfolio performs better that the market and other similar investment products. You should examine the perception of risk and return from an economic and behavioral perspective of the investors.

Assessment 2 – Report

Weight (%): 50%

Word Count or Equivalent: 2,500 words

You are required to submit a task-based project that where you will be required to test empirically specific financial investment models in practice in order to make a recommendation for investment decision. You will be using current market data, relevant technology (MS Excel and Financial Database) and acquired knowledge and skills during the module. The assessment covers both quantitative problem-solving skills and the ability to think critically and analytically against under guidelines constraints.

Each summative assessment will be preceded by an opportunity of formative assessment and followed by formative feedback for such opportunity.

Assessment tasks	LO1	LO4	LO8	LO9
Video blog- Group	X		X	X
Report		X	X	X

5. Indicative resources

Required Reading

Reilly F.K & Brown R.C., (2017). "Analysis of Investments and Management of Portfolios", Cengage Learning EMEA.

Thomson Reuters Eikon Platform: www.eikon.thomsonreuters.com

Financial Times Videos: www.FT.com/video

Wall Street Journal: www.wsj.com

Finance Accelerator Simulation: www.amplifyme,com

Recommended Reading
Bodie Z., Kane A & Marcus A., (2017). "Investments", Global edition, McGraw-Hill International Edition.

Hull J., (2017). "Options, futures, and other derivatives", Global edition, Prentice Hall.