Module code	FIN508	**Level**	5
Module title	Investments and Wealth Management	**Credit value**	20
Common/Core/ Elective	Core	**ECTS Credits**	10
		Notional learning hours	200
Courses on which the module is taught	BA (Hons) Business and Finance	**Teaching Period**	Spring

1. Module description

This module will equip you with the numerical and analytical techniques as well as an understanding of financial models for investment analysis that are used in global wealth management by private and institutional investors.

You'll acquire the skill set required to understand high-net-worth clients' needs and the various factors to be considered when advising them. You'll also learn how to analyse the main services, the financial regulatory regimes and alternative investment strategies for managing the wealth of high-net-worth individuals. By understanding mass affluence you will become familiar with vital aspects of wealth management, wealth accumulation, wealth preservation and wealth transfer.

This is a module particularly suited to those who are interested in finance, investment, private banking, and wealth management, either for further study or for a professional career.

2. Learning outcomes

Upon successful completion of this module you will be able to:

Decision-making (MLO 04)
Analyse and reflect on different investment opportunities to inform wealth management decision making.

Communication (MLO 05)
Communicate effectively both orally and in writing in multicultural and/or international settings within financial investment and wealth management contexts.

Discipline Knowledge (MLO 07)
Examine and apply theories, concepts and facts in investment and wealth management relevant to the task

Discipline Skills (MLO 08)
Employ portfolio management theory, technical analysis and statistical tools for wealth management purposes

3. Learning and teaching methods

Learning and teaching strategies for this module will be achieved through interactive workshop sessions in class coupled with self-guided learning.

You will learn the fundamental principles and theories in investment and wealth management. The sessions will include discussions about theory and practice, presentations, guest lectures by leading investment professionals, live webcasts from major asset management firms as well as videos. You will have the opportunity to practice valuation of assets in exercises and you will use financial data and different specialised financial markets software to create portfolios.

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

4. Assessment, formative feedback and relative weightings

Assessment 1
Presentation (Group assessment)
Weight (%): 50
Word Count or Equivalent: 15 minutes
You will build a diversified investment portfolio consisting of equities, fixed and alternative assets. To do this, you will collect and analyse data of relevant financial assets and make a professional presentation for a potential retail client investor.

Assessment 2
Report
Weight (%): 50
Word Count or Equivalent: 2500
You are required to produce a report for an investment broker agent. You will be required to apply various investment valuation techniques and methods by focusing on chosen current asset or investment product and using data from financial statements, ratio analysis and multiples you will write a professional report addressing specific tasks for this investment product assessment. The correct interpretation of the results will allow you to demonstrate competency in the wide area of wealth management.

Each summative assessment will be preceded by an opportunity of formative assessment accompanied by formative feedback.

Mapping of assessment tasks for the module				
Assessment tasks	**ML04**	**ML05**	**ML07**	**MLO8**
Presentation	X	X	X	X
Report	X		X	X

5. Indicative resources

Reilly, F. and Brown, K. (2019). Investment Analysis and Portfolio Management,11th edition, Boston: Cengage Learning.
Luu L, Lowe J, Butler J, Byrne T (2017) Essential Personal Finance - A Practical Guide for Students Routledge.

Chishti, Susanne (2017) The WEALTHTECH Book: The FinTech Handbook for Investors, Entrepreneurs and Finance Visionaries, Wiley
www.ft.com - Financial Times.
www.bloomberg.com - Bloomberg website. Assess to Bloomberg online live programmes and radio.
Yahoofinance.com. Bond and equities data.
Reuters.com. Financial ratios, beta and other data useful for company valuation.