



INSTITUTIONAL COURSE SYLLABUS TEMPLATE

Course Code: FIN 450	Course Title: Security Analysis & Portfolio Management
Course Instructor: Dr. Umara Noreen Dr. Lama ALkayed	Email: unoreen@psu.edu.sa lkayed@psu.edu.sa
Credit Hours: 3	Course Location: Google meet
Scheduled Office Hours: Sunday, Tuesday & Thursday: 10:00–11:00am Wednesday 10:00-11:00am	
Office Location: R328	
Co-Requisite: NA	Pre-Requisite: FIN350

Mission Statement

Our mission is to provide high quality education, research, and services in finance.

I. Course Description: The course objective is to describe the concept of investment and techniques for portfolio construction & management. Course offers to master the skills of portfolio management by exposing them to the process of investment including macroeconomic and industry analysis, company analysis, asset allocation decisions and portfolio performance and evaluation.

II. Course Learning Outcomes: To examine how to construct and manage a collection of investments (portfolio). Given the wide spread of support for efficient markets paradigm, we study the portfolio management mainly within an efficient market environment. However, we also pay attention to the fact that anomalies exist and our portfolio should be flexible enough to respond to these anomalies. In addition, portfolio construction is not possible in vacuum. Portfolio managers should be well educated to create the best possible collection of investments for each client’s unique needs and objectives. Since some of you may take jobs in financial industry as portfolio managers, the goal of this course is also to help you in acquiring important skills necessary for a portfolio manager including communication and presentation skills both written and oral and team building. On the successful completion of this course, students will be able to demonstrate the following:

Skills	Course Learning Outcomes
--------	--------------------------



Knowledge	CLO1. Identify how to construct and manage a collection of investments
Skills	CLO 2. Analyze the process of portfolio management and security valuation. CLO 3. Evaluate equity by using fundamental and technical analysis in order to form optimized portfolio
Competencies	CLO 4. Appraise portfolios and fund's manager performance CLO 5. Demonstrate good communication and numerical skills primarily through assignments as well as classroom discussions and report writing. CLO 6. Apply range of databases, financial portals and online simulations for portfolio management.

III. Tentative Weekly Course Schedule: (Should mention the specific course topics to be covered within the semester) *May change to accommodate guest presenters & student needs.*

WEEK	UNIT/ TOPIC	CLO(s) alignment	STUDENT TASKS (assignments, readings, exams, quizzes, presentations, etc...)	Number of Contact hours
1	Introduction			3
2	Chapter 22: Investors and the Investment Process	CLO1	Worksheet, major 1	3
4+5	Chapter 6: Efficient Diversification	CLO4	Major 1	6
6+7	Chapter 12: Macroeconomic and Industry Analysis	CLO2	Major 1	6
8+9	Chapter 8: The Efficient Market Hypothesis	CLO2	Major 2	6
10	Chapter 9: Behavioral Finance and Technical Analysis	CLO4	Major 2	3
11+12	Chapter 11: Managing Bond Portfolio	CLO1	Major 2	6
13	Chapter 13: Equity Valuation	CLO3	Final exam	3
14+15	Chapter 18: Portfolio Performance Evaluation	CLO2	Final exam	6
15	Project presentations	CLO5-6	Project + presentation	3



16	Final Exams	CLO1,2,3,4	Final exam	-
----	-------------	------------	------------	---

IV. Student Assessment & Teaching Strategies: Assessment Task

Domain	Assessment Task	Teaching Strategy
Knowledge	Exams (Major 1, 2 and Final)	Lectures + class discussions
Skills	Exams + project	Inquiry-guided instruction
Competencies	Project + presentation	Cooperative learning

V. Course Requirements

Group Projects

The goals of group projects are to develop students' analytical skills while exposing students to the International finance. Group projects are a key part of the overall grade and will be evaluated through written reports (outline/main). General guidelines for each project will be posted. Due dates will be posted. Each group must be composed of 5 students.

Course Website & Resources

The website Moodle will have many useful things onto it, including continuously updated information on assignments, readings, course schedule, etc. Please check regularly. Join Harvard Business Review (www.hbr.org) website and keep yourself updated.

Class Notes

The PowerPoint slides for each class will be available for downloading from the moodle. Note, however, that these slides only present a (brief) outline of the class discussion. You will still need to take additional notes to fully capture the material discussed in class. Reading the assigned book is imperative IF you choose to secure yourself a good grade. You cannot possibly prepare an exam by reading slides only and aim for an A-A+. This shall not happen in this class.

Midterm Exam The midterm exam will be based on the lectures, class discussions, assigned readings, and class assignments. The exam will include multiple choice, short answer, and essay questions.



Class Policy

- **Be prepared:** Make sure that you have read the readings assigned for each class. This will help you to better understand the material discussed in class and to actively participate in class discussions. Use of smart phone or any other devices is not allowed unless advised by the instructor.

VI. Schedule of Assessment

Assessment	Assessment Task	Week Due	Proportion of Final Assessment
1	Major 1	6 th week, 7 th October	15%
2	Portfolio management assignment using Bloomberg	7 th week, 14 th October	5%
3	Major 2	12 th week, 18 th Novmeber	20%
4	Project submission	14 th week, 02 December	20%
5	Final Examination	Week 16	40%

VII. Learning Resources

- **Required Text-book:** Essentials of Investments, Bodie, Kane & Markus, Essentials of Investments, 9th Ed. McGraw Hill. Recommendation: work with the textbook companion Web site: www.mhhe.com/bkm
- **Additional Resources**
- Textbook: Portfolio Construction, Management, and Protection, Robert A. Strong, 5th Ed. South-Western.
- Investments, Bodie, Kane & Marcus, Investments, 10th Ed. McGraw Hill. Recommendation: work with the textbook companion Web site: www.mhhe.com/bkm
- Recommended: Business Week, Financial Times, WSJ
- Other online useful references such as financial website, journals, and financial magazines will be used.
- Web Sites:

B. Facilities Required – Classroom with projector, computer, whiteboard, internet or WIFI.



C. Learning Management System – www.google.com/finance; www.cnbc.com; tadawul.com.sa; finance.yahoo.com; www.investopedia.com.

EDU-HUB Platform – The platform will be used for all online education experiences at PSU. It supports a variety of methods to support the teaching and learning strategies across all disciplines. It also includes the LMS.

VIII. Classroom Policies

A. Academic Integrity Policy (e.g., plagiarism or dishonesty)

“Plagiarism can be defined as unintentionally or deliberately using another person’s writing or ideas as though they are one’s own. Plagiarism includes, but is not limited to, copying another individual’s work and taking credit for it, paraphrasing information from a source without proper documentation, and mixing one’s own words with those of another author without attribution. In addition, buying a paper or project, or downloading a paper from the Internet, and submitting them as your own is also plagiarism. The penalty for academic dishonesty will bring course expulsion and failure, or even suspension” (Academic Integrity and Syllabus Acknowledgement Form).

B. Attendance Policy

Please, adhere to the following guidelines:

1. The University attendance policy will be strictly followed. In this course, the absence of **12** hours results in a Denied Notice (DN). (Refer to the student regulation handbook for further details.)
2. No make-up exams will be allowed except for university accepted documents. (Refer to the student regulation handbook for further details.)

C. Homework Submission Policy

Please note that you are responsible for knowing any changes or assignments announced in class.

- Arrive on time: Late-comers are very disturbing. Systematic tardiness will have a negative impact on your participation grade.
- Respect assignment deadlines: Late assignments will not be accepted without a prior agreement.



- Be honest: Cheating and plagiarism will result in a grade of “F” for the assignment/test for all parties involved.

IX. My Assumptions

- Mobiles are to be switched off during class hrs.
- No side talking while the instructor is still lecturing.
- Bring your books in every class.
- Do not interrupt the instructor, write down the question or comment you would like to make/raise and wait for the instructor to finish.
- I do not appreciate arguments made by the students to amend the grades. Whatever marks have been given to you are final unless there is a mistake in calculating them. Please do not waste my time and yours in bargaining for better marks. Work hard for it, so that your work is good enough and nothing can be added or taken away from it.
- Attend classes - it is a crucial part of the learning process and will affect your grade.
- Try to read the chapter before or after the lecture.
- Plan to be successful by scheduling a minimum of two hours study time outside of class for every hour in class; as a college student it is expected that you can and will work independently outside of class in order to meet the course requirements.
- During class think critically, ask questions, make notes and try to reflect on the material.
- Ensure you hand any assignments in on time - late submission will result in a reduction of your grade or probably zero.
- If you miss any class/es. It is entirely your responsibility to update yourself on any missing information etc.

Unfair Privilege: Please do not ask for any “extra work” to improve your standing. Start right so that you end it right!



Prince Sultan University
 College of Business Administration/
Finance Department
 1st Semester 2020 - 2021

TLC 2018 Form 12
 /Institutional Course
 Syllabus Template

Academic Year: 2019-2020

Instructor's Name: Dr. Lama Alkayed

Email: lkayed@psu.edu.sa

Term: 2nd/Spring Semester

Department: Finance

Office Extension: 8195

Time	Sun	Mon	Tue	Wed	Thu
08:00-08:50am	Consultation	Research	Consultation	Research	Consultation
Location	W319		W319		W319
09:00-09:50am	Consultation	Research	Consultation	Research	ACC 101
Location	W319		W319		N313
10:00-10:50am		FIN450		Research	ACC 101
Location		N305			N313
11:00-11:50am	FIN301	FIN450	FIN301	FIN450	FIN301
Location	N306	N305	N306	N305	N306
12:00-12:50pm	Admin Task		Admin Task		Admin Task
Location					
01:00-01:50pm	FIN301	FIN301	Academic advising		Academic advising
Location	N213	N306	W319		W319
02:00-02:50pm	FIN301		FIN301		FIN301
Location	N406		N212		N411
03:00-03:50pm					
Location					
04:00-04:50pm					
Location					
05:00-06:50pm					
Location					
06:00-09:50pm					
Location					