



INSTITUTIONAL COURSE SYLLABUS TEMPLATE

Course Code: FIN551	Course Title: Investment Analysis & Portfolio Management
Course Instructor: Prof. Noor Azlinna Azizan	Email: nazizan@psu.edu.sa
Credit Hours: 3	Course Location: Online and N 307
Scheduled Office Hours: Monday (5-6pm) Wednesday (5-6pm) and upon request	
Office Location: W319	
Co-Requisite:	Pre-Requisite:FIN550

Mission Statement

Our mission is to create an innovative academic environment to promote excellence in business education, research, and service in the Kingdom of Saudi Arabia through commitment to quality and continuous improvement in accordance with international standards.

I. Course Description:

This course provides students with a solid foundation in theories and methods of pricing securities. It provides an overview of the operation of the securities markets and the mechanics of trading securities. This course focuses on common stock, the stock market, and approaches to investing in the stock market and building stock portfolios. Particular emphasis is given to three competing approaches to stock investment: fundamental analysis, technical analysis and efficient market analysis. To optimize the skills, students will be exposed to modern portfolio theory which include risky asset allocation, portfolio performance and introduction to futures and options market. Students will use Tadawul Simulation, excel and Bloomberg Terminal to enhance their practical skills in stock trading and portfolio management.

II. Course Learning Outcomes:

On the successful completion of this course, students will be able to demonstrate the following:

	NQF Learning Domains And Course Learning Outcomes	Course Teaching Strategies	Course Assessment Methods
1.0	Knowledge		
1.1	CLO1: To explain comprehensive, coherent and systematic body of knowledge related to investment background, portfolio construction and portfolio management	Lectures, readings, end-of chapters questions, case discussion	Examinations – essay type, MCQs and case analysis, group-work project
2.0	Cognitive Skills		
2.1	CLO2: Ability to apply the general concepts of portfolio management and derivatives market	Numerical sets of problem, critical and analytical set of questions, individual and group projects	Examinations – essay type, MCQs and case analysis, group-work project
2.2	CLO3: Ability to construct efficient frontier and optimized portfolio with the skills to evaluate portfolios and fund's manager performance		
2.3	CLO4: Evaluate equity selection by using fundamental and technical analysis in order to form efficient portfolio		
3.0	Competencies		
3.1	CLO 5: Appraise portfolios and fund's manager performance	In-class discussion, end-of-chapter questions, group work assignment, case study	Examinations – essay type, MCQs and case analysis, group-work project Group project and critical analyses, case study
3.2	CLO 6: Demonstrate good communication, numerical and analytical skills through project and assignment as well as classroom discussions for local and global issues.	In-class discussion, end-of-chapter questions, group work assignment, case study	Examinations – essay type, MCQs and case analysis, group-work project Written report and presentation
3.3	CLO 7: Apply range of databases, financial	Students are using	Written report and



	portals and online simulations for portfolio management.	online stocks trading by using real everyday prices to develop their portfolio and trading stocks selection/BMC/ excel. (Group project/assignment using excel/BMC)	presentation
--	--	--	--------------

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 to Investment	1	In-class discussion, end-of-chapter questions, group work assignment, case study	3
2	Security market and Transaction	1,2	In-class discussion, end-of-chapter questions, group work assignment, case study	3
3	Risk and return of complete portfolio	1,2	In-class discussion, end-of-chapter questions, group work assignment, case	3



			study	
4	Macroeconomics and Industry Analysis (Fundamental) (Project will start)	4	In-class discussion, end-of-chapter questions, group work assignment, case study	3
5	Behavioral and Technical Analysis	4	In-class discussion, end-of-chapter questions, group work assignment, case study	3
6	Major 1 (15%)			3
7	Capital Allocation to Risky Asset	1,2,3	Numerical sets of problem, critical and analytical set of questions, individual and group projects	3
8	Optimal Risky Portfolios	1,2,3	Numerical sets of problem, critical and analytical set of questions, individual and group projects	3
9	Portfolio Performance Evaluation	2,3,5	In-class discussion, end-of-chapter questions, group work assignment, case study	3
10	Introduction to Derivatives market (a) Options Market (Close position for project)	1,2	In-class discussion, end-of-chapter questions, group	3



			work assignment, case study	
11	(b) Futures Market	1,2	In-class discussion, end-of-chapter questions, group work assignment, case study	3
12	Major 2 (15%)			3
13	Industrial Speaker/forum (5%)			3
14	Project Presentation	6,7	Group project by using Tadawul simulation and Bloomberg software.	3
15	Final Exam			3
16				

IV. Student Assessment & Teaching Strategies: Assessment Task (Indicate the kind of assessment tasks to be used to measure student learning in each of the learning domains. Example: quiz, oral examination, group work, etc.).

Teaching Strategies: (Please indicate the teaching and student activities to be used to develop the kinds of learning involved in each learning domain. Also, research specialized Information about Best Teaching Practices for the particular course/field).

Domain	Assessment Task	Teaching Strategy
Knowledge	Examinations – essay type, MCQs and case analysis, group-work project Written report and presentation	In-class discussion, end-of-chapter questions, group work assignment, case study
Skills	Examinations – essay type, MCQs and case analysis, group-work project Written report and presentation	Numerical sets of problem, critical and analytical set of questions, individual and group projects
Competencies	Examinations – essay type, MCQs and case analysis, group-work project	In-class discussion, end-of-chapter questions, group work assignment, case study



	Written report and presentation	
--	---------------------------------	--

V. Course Requirements

- Major and Final Examinations
- Class participation in discussions and attendance
- Participation in-group activities
- Oral and written tests (quizzes, take-home assignments)
- Individual and group projects

VI. Schedule of Assessment (Specify the schedule/date of assessment & proportion of assessment, attach related rubrics for each assessment if applicable. For examples of rubrics, visit www.irubrics.com . The schedule should be consistent with the academic calendar. Any significant changes should be avoided. If significant changes are made, academic leaders should be informed in writing, and students should be given a new schedule of assessment table).

Assessment	Week Due	Assessment Task	Proportion of Final Assessment
1	W6	Major 1 (exam) 22 FEB	15%
2	W12	Major 2 (exam) 5 April	15%
2	W10	BMC/Case study/Forum (Individual/group)5% BMC 5% case study/industrial speaker	10%
4	W14	Project (Group)	20%

VII. Learning Resources

Text book:

1. Investments, Bodie, Kane & Markus, Investments, 10th Ed. McGraw Hill. Recommendation: work with the textbook companion Web site: www.mhhe.com/bkm



2. Essential of Investments, Bodie, Kane and Marcus, 10th Edition. McGrawhill – supplement
3. Fundamental of Investing, Smart, Gitman and Joehnk, 13th Edition, Pearson.
4. Investment Analysis and Portfolio Management, Reilly and Brown, Thompson-South Western.

Recommended Readings

2. Business Week, Financial Times, WSJ, Arab news

Web Sites: www.Tadawul.com www.google.com/finance
 www.finance.yahoo.com; www.investopedia.com

B. Facilities Required– lecture room, computing resources (AV, data show, Smart Board, software, etc.) Internet access, Smart-Board

C. Learning Management System – The website Moodle will have many useful things onto it, including continuously updated information on assignments, readings, course schedule, etc. Please check regularly.

IX Classroom Policies -

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.

Attend regularly: Regular attendance will provide you with more opportunities to contribute to class and thus increase your participation grade.

Arrive on time: Late-comers are very disturbing. Systematic tardiness will have a negative impact on your participation grade.



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

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

It is each student's responsibility to become fully aware of the policies regarding academic dishonesty. Cheating, attempting to cheat, plagiarism or violating instructions and examination regulations will result in the offender being punished in accordance with the student disciplinary rules as issued by the university council.

B. Attendance Policy

In case of illness or other unavoidable cause of absence, the student must communicate as soon as possible with her instructor, indicating the reason for the absence. Students who suffer a prolonged absence of three or more consecutive days of in-class sessions must have an approved medical certificate submitted to the instructor substantiating the reason for absence. Absence in excess of that described in the College DN Policy, may result in failure or forced withdrawal from the course or program.

C. Homework Submission Policy

Respect assignment datedlines: 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.

D. NO FORMULA WILL BE GIVEN FOR THE EXAMS.

**ASSIGNMENTS OR PROJECTS WILL BE CHECKED BY THE INSTRUCTOR ONLY
ONE TIME BEFORE SUBMISSION TO CHECK THE DIRECTION OF THE
ASSIGNMENTS/PROJECTS NOT TO CONFIRM THE FINDINGS.**