

Course Outline (Higher Education)

School:	Federation Business School
Course Title:	INVESTMENTS AND PORTFOLIO MANAGEMENT
Course ID:	BUACC3721
Credit Points:	15.00
Prerequisite(s):	Nil
Co-requisite(s):	(BUACC3701)
Exclusion(s):	Nil
ASCED:	081105

Description of the Course:

On completion of this course students should be able to demonstrate an understanding of the conceptual foundations of modern portfolio theory, using pricing models and other techniques in the valuation of securities; appreciate the effect of market efficiency on the valuation process; measure portfolio risk and determine performance benchmarks; and be able to take an applied perspective on investment management and analysis in the Australian and International environment.

Grade Scheme: Graded (HD, D, C, P, MF, F, XF)

Work Experience:

No work experience: Student is not undertaking work experience in industry.

Placement Component: No

Supplementary Assessment: Yes

Where supplementary assessment is available a student must have failed overall in the course but gained a final mark of 45 per cent or above and submitted all major assessment tasks.

Program Level:

Level of course in Program	AQF Level of Program					
	5	6	7	8	9	10
Introductory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Intermediate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Level of course in Program	AQF Level of Program					
	5	6	7	8	9	10
Advanced	■	■	✓	■	■	■

Learning Outcomes:

Knowledge:

- K1.** Identify the overall investment process and the key elements involved in the investment process such as asset allocation and security selection
- K2.** Analyse and evaluate the various investment opportunities available to investors
- K3.** Describe modern portfolio theory
- K4.** Apply asset pricing models and valuation techniques to the valuation of assets
- K5.** Examine and comment on the recent developments in the field of Investments

Skills:

- S1.** Apply theoretical and practical knowledge to critically evaluate financial market information to measure risk and return and alternative investments
- S2.** Determine the appropriate mix of investments for optimal portfolio security.
- S3.** Calculate various quantitative analysis methods for investments
- S4.** Evaluate current and emerging issues in the field of investments

Application of knowledge and skills:

- A1.** Apply critical thinking, problem solving and presentation to activities dealing with investments and portfolio management
- A2.** Exercise critical thinking and judgement and apply it to assist in the decision making process for investments.

Course Content:

Topics may include:

- Overview of the Investment Environment
- How Securities are Traded
- Stock Valuation: Macroeconomic, Industry and Company Analysis
- Professionally Managed Investment Funds
- Principles of Portfolio Management:
- Optimal Portfolios
- Market Efficiency

- Fixed Income Securities
- Derivatives and Futures

Values:

- V1.** Appreciate the complexity of the domestic and international investment environment
- V2.** Appreciate the dynamic nature of the investment environment need to keep up to date with current events
- V3.** Appreciate the need for continuous learning in order to maintain up-to-date skills and knowledge

Graduate Attributes

The Federation University FedUni graduate attributes (GA) are entrenched in the [Higher Education Graduate Attributes Policy](#) (LT1228). FedUni graduates develop these graduate attributes through their engagement in explicit learning and teaching and assessment tasks that are embedded in all FedUni programs. Graduate attribute attainment typically follows an incremental development process mapped through program progression. **One or more graduate attributes must be evident in the specified learning outcomes and assessment for each FedUni course, and all attributes must be directly assessed in each program**

Graduate attribute and descriptor		Development and acquisition of GAs in the course	
		Learning Outcomes (KSA)	Assessment task (AT#)
GA 1 Thinkers	Our graduates are curious, reflective and critical. Able to analyse the world in a way that generates valued insights, they are change makers seeking and creating new solutions.	K1, K2, K4, K5, S1, S3, A1, A2	AT1 AT2 AT3
GA 2 Innovators	Our graduates have ideas and are able to realise their dreams. They think and act creatively to achieve and inspire positive change.	S2, A1	AT2
GA 3 Citizens	Our graduates engage in socially and culturally appropriate ways to advance individual, community and global well-being. They are socially and environmentally aware, acting ethically, equitably and compassionately.	K4, K5, S4, A2	AT1
GA 4 Communicators	Our graduates create, exchange, impart and convey information, ideas, and concepts effectively. They are respectful, inclusive and empathetic towards their audience, and express thoughts, feelings and information in ways that help others to understand.	K3, K5, A1	AT1 AT3
GA 5 Leaders	Our graduates display and promote positive behaviours, and aspire to make a difference. They act with integrity, are receptive to alternatives and foster sustainable and resilient practices.	A1, A2	AT1

Learning Task and Assessment:

Learning Outcomes Assessed	Learning Tasks	Assessment Type	Weighting
K1, K2, K3, K4, K5 S1, S2, S3, S4 A1, A2	Review of selected topics, based on class activities, reading, and preparation of responses to set questions.	Presentations (Class/Group or Online) and or Test	10-20%

Learning Outcomes Assessed	Learning Tasks	Assessment Type	Weighting
K1, K2, K3, K4, K5 S1, S2, S3, S4 A1, A2	Individual assignment comprising practical and / or essay writing with online segment requiring research	Assignment	20-30%
K1, K2, K3, K4, K5 S1, S2, S3, S4 A1, A2	Comprehensive review of all topics, based on class activities, reading, and preparation of responses to set questions.	Final Summative Assessment	60-70%

Adopted Reference Style:

APA

Refer to the [library website](#) for more information

Fed Cite - [referencing tool](#)