

Unit Outline (Higher Education)

Institute / School: Institute of Innovation, Science & Sustainability

Unit Title: INVESTMENTS AND PORTFOLIO MANAGEMENT

Unit ID: BUACC3721

Credit Points: 15.00

Prerequisite(s): Nil

Co-requisite(s): Nil

Exclusion(s): Nil

ASCED: 081105

Description of the Unit:

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

Placement Component: No

Supplementary Assessment: Yes

Where supplementary assessment is available a student must have failed overall in the Unit but gained a final mark of 45 per cent or above, has completed all major assessment tasks (including all sub-components where a task has multiple parts) as specified in the Unit Description and is not eligible for any other form of supplementary assessment

Course Level:

| Level of Unit in Course | AQF Level of Course | | | | | |
|-------------------------|---------------------|---|---|---|---|----|
| | 5 | 6 | 7 | 8 | 9 | 10 |
| Introductory | ■ | ■ | ■ | ■ | ■ | ■ |
| Intermediate | ■ | ■ | ■ | ■ | ■ | ■ |
| 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 and problem solving 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.

Unit 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

FEDTASKS

Federation University Federation recognises that students require key transferable employability skills to prepare them for their future workplace and society. FEDTASKS (**T**ransferable **A**tttributes **S**kills and **K**nowledge) provide a targeted focus on five key transferable Attributes, Skills, and Knowledge that are embedded within curriculum, developed gradually towards successful measures and interlinked with cross-discipline and Co-operative Learning opportunities. *One or more FEDTASK, transferable Attributes, Skills or Knowledge must be evident in the specified learning outcomes and assessment for each FedUni Unit, and all must be directly assessed in each Course.*

| FEDTASK attribute and descriptor | | Development and acquisition of FEDTASKS in the Unit | |
|---|--|---|-----------------------|
| | | Learning Outcomes (KSA) | Assessment task (AT#) |
| FEDTASK 1 Interpersonal | Students will demonstrate the ability to effectively communicate, inter-act and work with others both individually and in groups. Students will be required to display skills in-person and/or online in: <ul style="list-style-type: none"> • Using effective verbal and non-verbal communication • Listening for meaning and influencing via active listening • Showing empathy for others • Negotiating and demonstrating conflict resolution skills • Working respectfully in cross-cultural and diverse teams. | Not Applicable | Not Applicable |
| FEDTASK 2 Leadership | Students will demonstrate the ability to apply professional skills and behaviours in leading others. Students will be required to display skills in: <ul style="list-style-type: none"> • Creating a collegial environment • Showing self-awareness and the ability to self-reflect • Inspiring and convincing others • Making informed decisions • Displaying initiative | Not Applicable | Not Applicable |
| FEDTASK 3 Critical Thinking and Creativity | Students will demonstrate an ability to work in complexity and ambiguity using the imagination to create new ideas. Students will be required to display skills in: <ul style="list-style-type: none"> • Reflecting critically • Evaluating ideas, concepts and information • Considering alternative perspectives to refine ideas • Challenging conventional thinking to clarify concepts • Forming creative solutions in problem solving. | K3,K4,K5,S3,S4,A2 | AT1,AT2,AT3 |

| FEDTASK attribute and descriptor | | Development and acquisition of FEDTASKS in the Unit | |
|--|---|---|-----------------------|
| | | Learning Outcomes (KSA) | Assessment task (AT#) |
| FEDTASK 4 Digital Literacy | Students will demonstrate the ability to work fluently across a range of tools, platforms and applications to achieve a range of tasks. Students will be required to display skills in: <ul style="list-style-type: none"> • Finding, evaluating, managing, curating, organising and sharing digital information • Collating, managing, accessing and using digital data securely • Receiving and responding to messages in a range of digital media • Contributing actively to digital teams and working groups • Participating in and benefiting from digital learning opportunities. | K1,K2,S4,A1 | AT3 |
| FEDTASK 5 Sustainable and Ethical Mindset | Students will demonstrate the ability to consider and assess the consequences and impact of ideas and actions in enacting ethical and sustainable decisions. Students will be required to display skills in: <ul style="list-style-type: none"> • Making informed judgments that consider the impact of devising solutions in global economic environmental and societal contexts • Committing to social responsibility as a professional and a citizen • Evaluating ethical, socially responsible and/or sustainable challenges and generating and articulating responses • Embracing lifelong, life-wide and life-deep learning to be open to diverse others • Implementing required actions to foster sustainability in their professional and personal life. | S4 | AT3 |

Learning Task and Assessment:

| Learning Outcomes Assessed | Assessment 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% |
| 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](#)