

Unit Outline (Higher Education)

Institute / School: Institute of Innovation, Science & Sustainability

Unit Title: Investment and Portfolio Management

Unit ID: BUECO2302

Credit Points: 15.00

Prerequisite(s): (BUACC1000)

Co-requisite(s): Nil

Exclusion(s): (BUACC3721)

ASCED: 081105

Description of the Unit:

On completion of this unit 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 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

Learning Task and Assessment:

Learning Outcomes Assessed	Assessment Tasks	Assessment Type	Weighting
K1, K2, K3, K4, K5 A1, A2	Individual moodle test	Test	10-20%
K1, K2, K3, K4, K5 S1, S2, S3, S4 A1, A2	Individual assignment comprising practical case scenario and/or essay question requiring research	Written Assignment	30-40%
K1, K2, K3, K4, K5 S1, S2, S3, S4 A1, A2	Comprehensive review of all topics/final examination.	Final Summative Assessment	50-60%

Adopted Reference Style:

APA

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