



Department of: Business Administration

College of Administrative and Financial Sciences

University of *Cihan*

Subject / Investment and portfolio management

Course Book – Year 4 (first semester)

Lecturer's name: Mohammed Jalal

Academic Year: 2023/2024

Course Book

1. Course name	Investment and portfolio management
2. Lecturer in charge	Mohammed Jalal Mohammed Ameen
3. Department/ College	Business Administration
4. Contact	e-mail: mhamadjll@yahoo.com Tel: 07510091209
5. Time (in hours) per week	2 Hours
6. Office hours	Tuesday 8:30 – 2:30 on campus
7. Course code	ACC34106
8. Teacher's academic profile	PhD in Management at the Cardiff metropolitan University and Masters degree in business administration at Swansea University-UK 2009, teaching at different universities and institutions including Cihan university 2015-2016 and 2016-2017. Komar university for science and technology 2016-2017. Dukan technical institute 2010-2012. Currently at the end of studying a PhD at Cardiff Metropolitan university-UK.
9. Keywords	Data, information, management
10. Course overview:	
<p>As future financial managers or financial consultants, business students must know how financial markets price capital assets. This knowledge is crucial for all market participants. Individuals and portfolio managers should have the ability to handle efficiently the tools needed to select assets, manage risk and construct optimal portfolios</p>	
11. Course objective:	
<p>The course focuses on the key elements and basic concepts of investment management and its relevance in the market economy and strategy planning. It focuses on financial markets, markets in which funds are transferred from people who have an excess of available funds to people who have a shortage. The course will provide students with a systematic framework for understanding how the financial markets work, and illustrates the basic elements of portfolio management</p>	
12. Student's obligation	
<p>Students are expected to attend all lectures and must attend all examinations, quizzes, and exercises.</p> <ul style="list-style-type: none"> • Enthusiastically participate in discussions. • Doing homework without copying from classmates. • Do not neglect the issues that are not understood. in the meantime, do not engage with cell 	

phones.

13. Forms of teaching

1. **Lectures:** The lectures provide a broad introduction to each topic and emphasis key concepts.
2. **Case Studies:** the numerous Case Studies are an important learning tool, integrated closely with the theoretical material presented in each chapter.
3. **Graphs:** graphs should help students both learn and review the material.
4. **Videos:** there are many available videos which explain the studied subjects in a clearer way
5. **Question Examples:** I show examples of the exam questions
6. **In class brainstorming sessions:** Team-work, assignments and presenting the assignment contents and ideas are required.
7. **Quick Quizzes:** There are some announced quizzes.
8. **Feedback:** Feedback on student progress will be given throughout the course.
9. **Class participation:** Class participation is encouraged and will influence your grade.
10. **Exams:** Exams are all comprehensive in nature.

14. Assessment scheme

The assessment tools will be :

Mid-term exam	30%
Class activities	5%
quiz	5%
Final Exam	60%
Total	100%

15. Student learning outcome:

Upon completion of this course, the student should be able to:

1. **Identify** basic terminologies regarding investment and portfolio management.
2. **Define** the objectives in constructing and managing a portfolio.
3. **Learn** to compute historical and expected returns, as well as risk measures and comprehend the importance of the risk-return relationship.
4. **Explain** how to use Management information for decision making.
5. **critically assess** empirical evidence of market performance and contrast it with theories of market performance

16. Course Reading List and References:

1. Reilly, Frank K., and Keith C. Brown. *Investment analysis and portfolio management*. Cengage Learning, 2011.
– Bodie, Zvi, Alex Kane, and Alan Marcus. *EBOOK: Essentials of Investments: Global Edition*. McGraw Hill, 2013.

17. The Topics:		
Weeks	Topics	Date
1	Introduction to investment and portfolio management	
2	Investment Basics	
3	Money, Banking, and Financial Markets	
4	Asset Allocation - Investment Policy Statement	
5	Desired Interest-Rate risk	
6	Financial Intermediation	
7	Exercises	
8	Portfolio Performance Evaluation	
9	Crisis and Response	
10	Exercises (problem solving during classes)	
11	Financial market participants and their roles	
12	Private wealth management	
13	Financial News	
14	Computing the Price of Common Stock	
15	Review of the course outcome	
18. Practical Topics (If there is any)		
N/A		
19. Examinations:		
<p>1. Compositional: In this type of exam the questions usually starts with Explain how, What are the reasons for...?, Why...?, How....? With their typical answers</p> <p>Q1: why Interest rates are important?</p> <p>Interest rates are important on a number of levels. On a personal level, high interest rates could deter you from buying a house or a car because the cost of financing it would be high. Conversely, high interest rates could encourage you to save because you can earn more interest income by putting aside some of your earnings as savings. On a more general level, interest rates have an impact on the overall health of the economy because they affect not only consumers' willingness</p>		

to spend or save but also businesses investment decisions. High interest rates, for example, may cause a corporation to postpone building a new plant that would ensure more jobs

2- Multiple choice questions

20. Extra notes:

Students will be assessed during each class and as this course needs more understanding, suggestions from students regarding the method of teaching are welcomed

21. Peer review