

FINC 3008 INVESTMENT MANAGEMENT

Credit Points 10

Legacy Code 200819

Coordinator Gulay Avsar ([https://directory.westernsydney.edu.au/search/name/Gulay Avsar/](https://directory.westernsydney.edu.au/search/name/Gulay%20Avsar/))

Description Investment Management describes the theory and practice of investment decision-making. The general objective of the unit is to introduce students to the tools of financial investment by providing a conceptual framework within which the key financial decision of investment can be analysed. This unit provides an overview of the theory of investing by describing investor indifference curves and optimal portfolios. The unit will include evaluating asset allocation, security selection and security analysis within an active portfolio management framework, measuring portfolio performance and security selection decisions.

School Business

Discipline Investment and Securities

Student Contribution Band HECS Band 4 10cp

Check your HECS Band contribution amount via the Fees (https://www.westernsydney.edu.au/currentstudents/current_students/fees/) page.

Level Undergraduate Level 3 subject

Incompatible Subjects ECON 3015 - Investment Management ECON 3020 - Portfolio Management

Learning Outcomes

On successful completion of this subject, students should be able to:

1. Demonstrate comprehensive disciplinary knowledge regarding the sources of finance, and the financial instruments in the Australian financial environment.
2. Evaluate equities, bonds and bills from an investment perspective.
3. Provide micro and macro analysis as applied to stock selection.
4. Evaluate both quantitative and qualitative indicators of investment returns and risk.
5. Apply portfolio performance measurement tools and manage a diversified portfolio.
6. Demonstrate comprehensive disciplinary knowledge regarding investor requirements with actual outcomes, as measured in the performance measurement stage.
7. Demonstrate knowledge of the theory of active portfolio management and the Capital Asset Pricing Model.

Subject Content

1. Risk versus return trade-off, analysis and valuation of securities.
2. Portfolio performance evaluation.
3. Managing portfolios.
4. Efficient markets.
5. Empirical evidence on security returns.
6. Theory of active portfolio management.
7. Capital Asset Pricing Model.

Assessment

The following table summarises the standard assessment tasks for this subject. Please note this is a guide only. Assessment tasks are regularly updated, where there is a difference your Learning Guide takes precedence.

Item	Length	Percent	Threshold	Individual/Group Task
Presentation	10 minutes	20	N	Group
Multiple Choice	90 minutes	30	N	Individual
Practical Exam	2 hours	50	Y	Individual

Prescribed Texts

Reilly, FK, Brown, KC, Lamba, A & Elston, F 2020, Investment analysis & portfolio management: Asia-Pacific edition, 3 / 4 Cengage Learning, South Melbourne, Vic.

Teaching Periods

Autumn

Online

Online

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View timetable (https://classregistration.westernsydney.edu.au/even/timetable/?subject_code=FINC3008_22-AUT_ON_0#subjects)

Parramatta City - Macquarie St

Day

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UEH-Session 1

Vietnam

Day

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Sydney City Campus - Term 2

Sydney City

Day

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UEH-Session 3

Vietnam

Day

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View timetable (https://classregistration.westernsydney.edu.au/even/timetable/?subject_code=FINC3008_22-UT3_UE_D#subjects)