FINC 3018 INVESTMENT ANALYSIS

Credit Points 10

Coordinator Gulay Avsar (https://directory.westernsydney.edu.au/search/name/Gulay Avsar/)

Description Investment Analysis provides students with the theory and practice of investment decision-making. The subject will introduce students to the theory of financial investment by providing a conceptual framework within which the key financial decisions of investment can be analysed. Students will develop skills in the evaluation of investment portfolio performance and examine the strategies of active portfolio management. The subject engages students in practical exercises in the evaluation of asset allocations, and the application of a professional financial data suite that is relevant to current industry practice.

School Business

Discipline Banking and Finance

Student Contribution Band

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

Level Undergraduate Level 3 subject

Equivalent Subjects FINC 3008

Learning Outcomes

After successful completion of this subject, students will be able to:

1. Identify 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 analyses as applied to stock selection
4. Evaluate both quantitative and qualitative indicators of investment returns and risk.
5. Apply portfolio performance measurement tools to manage a diversified portfolio, including as part of a team.

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.

Prescribed Texts

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