1. **Title of the module**

BUSN8030 (CB8030) Investments and Portfolio Management

1. **School or partner institution which will be responsible for management of the module**

Kent Business School

1. **The level of the module (Level 4, Level 5, Level 6 or Level 7)**

Level 7

1. **The number of credits and the ECTS value which the module represents**

15 credits (7.5 ECTS)

1. **Which term(s) the module is to be taught in (or other teaching pattern)**

Spring

1. **Prerequisite and co-requisite modules**

None

1. **The programmes of study to which the module contributes**

MSc Finance (International Banking and Finance); MSc Finance (Finance and Management); MSc Finance (Finance, Investment and Risk); MSc Finance (Financial Markets)

1. **The intended subject specific learning outcomes.  
   On successfully completing the module students will be able to:**

8.1 Demonstrate knowledge and understanding of different asset classes and asset allocation decision.

8.2 Identify and evaluate various financial investments available globally.

8.3 Demonstrate knowledge and understanding of security valuation models/methods and processes.

8.4 Conduct macro and micro-valuation of stock market, industry, and company/stocks to make investment/portfolio management decisions.

8.5 Demonstrate knowledge and understanding of equity portfolio management and performance evaluation strategies.

8.6 Identify, find, select, record, organise and manipulate knowledge and data relevant to issues and tasks related to investments and portfolio management.

8.7 Demonstrate knowledge and understanding of important theoretical and empirical studies within the field of investments and portfolio management and the ability to interpret and evaluate results from such studies.

1. **The intended generic learning outcomes.  
   On successfully completing the module students will be able to:**

9.1 Analyse, compare, discuss, and critically evaluate various theories. To structure, develop and defend complex arguments orally and in writing.

9.2 Plan work, use relevant sources and study independently.

9.3 Work in groups, listen, and respond to different points of view and negotiate outcomes. Ability to receive and use criticism and advice.

9.4 Select appropriate formats for presentation of work, which includes the acknowledgement and reference of sources.

9.5 Analyse structured and unstructured problems.

1. **A synopsis of the curriculum**

This module assumes basic knowledge and understanding of risk-return relationship, portfolio theory, and CAPM. It considers the investment and portfolio management decision in more detail by first examining the asset allocation decision and investments in a global context. It then attempts to evaluate different types of securities (bonds and stocks) in which investments can be made using a three-step top-down approach consisting of macro- and micro-market analysis, industry analysis and finally, company analysis. It then critically examines different equity portfolio management and performance evaluation strategies.

1. **Reading list (Indicative list, current at time of publication. Reading lists will be published annually)**

Bodie Z; Kane A & Marcus A.J (2014) Investments, 10th ed. New York: McGraw Hill

Elton, E.J., Gruber, M.J, Brown, S.J and Goetzmann, W.N. (2014) Modern Portfolio Theory and Investment Analysis, 9th ed. Chichester: John Wiley

Brown, K.C. & Reilly, F.K. (2012), Analysis of Investments and Management of Portfolios Independence, Kentucky: Cengage Learning

1. **Learning and teaching methods**

Total contact hours: 36

Private study hours: 114

Total study hours: 150

1. **Assessment methods**
   1. Main assessment methods

Group report (2500 words) (30%)

Examination, 2 hours (70%).

13.2 Reassessment methods

100% examination

1. **Map of module learning outcomes (sections 8 & 9) to learning and teaching methods (section12) and methods of assessment (section 13)**

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Module learning outcome** | *8.1* | *8.2* | *8.3* | *8.4* | *8.5* | *8.6* | *8.7* | *9.1* | *9.2* | *9.3* | *9.4* | *9.5* |
| **Learning/ teaching method** |  |  |  |  |  |  |  |  |  |  |  |  |
| Private Study | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** |
| Lectures | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** |
| Seminars/Workshops | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** |
| **Assessment method** |  |  |  |  |  |  |  |  |  |  |  |  |
| Examination | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** |  | **x** | **x** |
| Group report | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** |

1. **Inclusive module design**

The School recognises and has embedded the expectations of current equality legislation, by ensuring that the module is as accessible as possible by design. Additional alternative arrangements for students with Inclusive Learning Plans (ILPs)/declared disabilities will be made on an individual basis, in consultation with the relevant policies and support services.

The inclusive practices in the guidance (see Annex B Appendix A) have been considered in order to support all students in the following areas:

a) Accessible resources and curriculum

b) Learning, teaching and assessment methods

1. **Campus(es) or centre(s) where module will be delivered**

Canterbury

1. **Internationalisation**

Finance is an international language and associated quantitative techniques will reflect this. The intended learning outcomes are applicable worldwide as part of the universal principles of Finance. With regard to subject content, the material within the syllabus has been developed for use within an international educational setting for students who will apply financial theories in a wide range of international contexts. The reading list also has references to international research. Our international teaching team is also diverse and international. Our support for students in KBS is also internationally attuned, given our international student body.

**FACULTIES SUPPORT OFFICE USE ONLY**

**Revision record – all revisions must be recorded in the grid and full details of the change retained in the appropriate committee records.**

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| Date approved | Major/minor revision | Start date of the delivery of revised version | Section revised | Impacts PLOs (Q6&7 cover sheet) |
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Revised FSO Jan 2018