1. KentVision Code and title of the module

BUSN8030: Advanced Investment Management

## Division which will be responsible for management of the module

Kent Business School

## The level of the module (Level 4, Level 5, Level 6 or Level 7)

Level 7

## The number of credits and the ECTS value which the module represents

15 credits (7.5 ECTS)

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

Spring

## Prerequisite and co-requisite modules and/or any module restrictions

None

## The course(s) of study to which the module contributes

Compulsory to the following courses:

 MSc Finance

 MSc Finance, Investment and Risk

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

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

8.2 Identify and critically evaluate various financial investments available globally.

8.3 Demonstrate in-depth 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 an in-depth knowledge and understanding of equity portfolio management and performance evaluation strategies.

8.6 Identify, find, select, record, organise and manipulate complex 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 complex results from such studies.

## 8.8 Demonstrate knowledge and understanding of the process of developing investment strategies that provide informed market-based solutions to environmental and social challenges

## 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 to a variety of audiences and/or using a variety of methods..

9.2 Plan work, use relevant sources and study independently.

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

9.4 Analyse complex structured and unstructured problems.

## 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. The module also examines how the risk-return relationship can incorporate ESG considerations on financial and investment decisions.

## Reading list

## The University is committed to ensuring that core reading materials are in accessible electronic format in line with the Kent Inclusive Practices.

## The most up to date reading list for each module can be found on the university's [reading list pages](https://kent.rl.talis.com/index.html).

## Contact Hours

Total contact hours: 33

Private study hours: 117

Total study hours: 150

## Assessment methods

* 1. Main assessment methods

Group report (2,000 words) (30%)

Examination, 2 hours (70%)

13.2 Reassessment methods

 100% examination

## Map of module learning outcomes (sections 8 & 9) to learning and teaching methods (section 12) and methods of assessment (section 13)

**Module learning outcomes against learning and teaching methods:**

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Module learning outcome** | *8.1* | *8.2* | *8.3* | *8.4* | *8.5* | *8.6* | *8.7* | *8.8* | *9.1* | *9.2* | *9.3* | *9.4* |
| 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** |

**Module learning outcomes against assessment methods:**

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Module learning outcome** | *8.1* | *8.2* | *8.3* | *8.4* | *8.5* | *8.6* | *8.7* | *8.8* | *9.1* | *9.2* | *9.3* | *9.4* |
| Group report | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** |  | **x** | **x** |
| Examination | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** | **x** |

## Inclusive module design

The Division 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

## Campus(es) or centre(s) where module will be delivered

Canterbury

## 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.

**DIVISIONAL USE ONLY**

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

| Date approved | New/Major/minor revision | Start date of delivery of (revised) version | Section revised(if applicable) | Impacts PLOs (Q6&7 cover sheet) |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
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