

Course Description Template: Investment Portfolio Management

1. Course Name:	
Investment Portfolio Management	
2. Course Code:	
WBA-42-04	
3. Semester/Year:	
Second Session	
4. Date of preparation of this description:	
1/10/2024	
5. Available Forms of Attendance:	
Physical + electronic (when needed)	
6. Number of Hours (Total) / Number of Units (Total):	
3 Hours / 3 Units	
7. Course Administrator Name	
Name: Assoc. Prof. Dr. Hebatullah Mustafa Al-Sayed Ali Email: Hebatallah.Mu@g.uowa.edu.iq	
8. Course Objectives	
<ul style="list-style-type: none"> ✓ Introduce the student to the basics of investment, types of investment portfolios and their management policies. ✓ Enable the student to measure and analyze the return and risk of securities (stocks and bonds) and investment portfolios. ✓ Providing the student with the skill of building optimal investment portfolios through the application of the principle of effective diversification. ✓ Train the student to use different evaluation models (e.g., Sharp, Trainor, Jensen) to measure portfolio performance. ✓ Understand the concepts of market efficiency and behavioral finance and their impact on investment 	Course Objectives

decisions.

9. Teaching and Learning Strategies					
<div><div>✓ Theoretical lectures to explain financial concepts and models.</div><div>✓ Exercises and practical application sessions to enhance mathematical and analytical skills.</div><div>✓ Classroom discussions and dialogue to promote a deep understanding of the material.</div><div>✓ Analyze practical case studies to understand how theories are applied in reality.</div></div>					Strategy
10. Course Structure					
Evaluation Method	Learning Method	Name of Unit or Topic	Required Learning Outcomes	Hours	Week
Classroom Participation	Lecture + Exercises	Chapter One: Fundamentals of Investment (Concept, Principles, Types).	Understand the basic concepts and principles of investment and its types.	3	1
Classroom Participation	Lecture + Exercises	Chapter Two: Return and Risk (Concepts, Types, and Calculation Methods).	Measure the return and risk of individual assets.	3	2
duty	Lecture + Exercises	Chapter Three: Valuation of Common Shares.	Valuation of common stocks using different models.	3	3
Classroom Participation	Lecture + Exercises	Chapter Four: Valuation of Bonds.	Evaluating bonds and understanding their relationship to interest rates.	3	4
Daily exam	Lecture + Discussion	Chapter Five: Capital Market Efficiency and Behavioral Finance.	Understand the assumptions of market efficiency and the impact of behavioral finance.	6	5-6
First monthly exam	Lecture + Exercises	Chapter Six: Measuring the Return and Risk of the Investment Portfolio.	Measure the return and risk of a portfolio of two or more assets.	3	7
duty	Lecture + Exercises	Chapter Seven: Building Investment Portfolios and the Principle of Diversification.	Understand how to build portfolios and apply the principle of diversification to reduce risk.	6	8-9
Classroom Participation	Lecture + Exercises	Chapter Eight: Asset Valuation and Portfolio	Apply asset valuation and portfolio	9	10-12

		Performance Models (CAPM, Sharpe, Treynor, Jensen).	performance measurement models.		
Exam score	Electronic Exam	The second monthly exam.	A comprehensive assessment of the student's understanding of the advanced topics.	3	13
Classroom activity	Case Study + Discussion	Practical applications and a comprehensive case study.	Apply the concepts to an integrated process case.	3	14
Oral questions	Lecture + Review	Chapter Nine: Introduction to Financial Derivatives and a Comprehensive Review.	Identify financial derivatives and review the material.	3	15

11. Course Evaluation

Distribute the score out of 100 according to the tasks assigned to the student, such as daily preparation, daily, oral, monthly, and written exams, and reports..... etc

- I. Attendance and participation 10 degrees
- II. Daily Exams 10 degrees
- III. First Monthly Exam 15 degrees
- IV. Second Monthly Exam 15 degrees
- Final Exam: 50

V. Total = 100 Marks

12. Learning and Teaching Resources

1. Al-Momani, Ghazi Falah, **Modern Investment Portfolio Management**, Dar Al-Manahil, 2013.
2. Mohamed Matar, Fayez Team, **Investment Portfolio Management**, Dar Wael, 2005.
3. Al-Ameri, Mohamed Ali Ibrahim , **Investment Portfolio Management**, Dar Wael, 2013.
- 4- **Bodie, Zvi, & Kane, Marcus, Alan J., Investments And Portfolio Management, 9th Edition, Mcgraw-Hill, USA, 2011.**

Required Textbooks