

FINC 3008 INVESTMENT MANAGEMENT

Credit Points 10

Legacy Code 200819

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

Description Investment Management describes the theory and practice of investment decision-making. The general objective of the subject 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 subject provides an overview of the theory of investing by describing investor indifference curves and optimal portfolios. The subject 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 fees 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.

Type	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

Vietnam Session 1 (2024)

Vietnam

On-site

Subject Contact Kelly Liu ([https://directory.westernsydney.edu.au/search/name/Kelly Liu/](https://directory.westernsydney.edu.au/search/name/Kelly%20Liu/))

View timetable (https://classregistration.westernsydney.edu.au/even/timetable/?subject_code=FINC3008_24-UT1_UE_1#subjects)

Autumn (2024)

Parramatta City - Macquarie St

On-site

Subject Contact Kelly Liu ([https://directory.westernsydney.edu.au/search/name/Kelly Liu/](https://directory.westernsydney.edu.au/search/name/Kelly%20Liu/))

View timetable (https://classregistration.westernsydney.edu.au/even/timetable/?subject_code=FINC3008_24-AUT_PC_1#subjects)

Vietnam Session 2 (2024)

Vietnam

On-site

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

View timetable (https://classregistration.westernsydney.edu.au/even/timetable/?subject_code=FINC3008_24-UT2_UE_1#subjects)

Vietnam Session 3 (2024)

Vietnam

On-site

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

View timetable (https://classregistration.westernsydney.edu.au/even/timetable/?subject_code=FINC3008_24-UT3_UE_1#subjects)

Sydney City Campus - Term 3 (2024)

Sydney City

On-site

Subject Contact Neelam Goela ([https://directory.westernsydney.edu.au/search/name/Neelam Goela/](https://directory.westernsydney.edu.au/search/name/Neelam%20Goela/))

View timetable (https://classregistration.westernsydney.edu.au/even/timetable/?subject_code=FINC3008_24-SC3_SC_1#subjects)