

# FINC 3016 PROPERTY PORTFOLIO ANALYTICS

**Credit Points** 10

**Coordinator** Jufri Marzuki ([https://directory.westernsydney.edu.au/search/name/Jufri Marzuki/](https://directory.westernsydney.edu.au/search/name/Jufri%20Marzuki/))

**Description** This subject examines the strategic role of property in a diversified investment portfolio, with a focus on performance analysis and investment strategy. It covers both direct and indirect property investment, particularly Real Estate Investment Trusts and unlisted property funds in both Australian and global contexts. Students will assess the risk-return characteristics of property and its contribution to portfolio objectives. The subject also explores how environmental, social and governance (ESG) factors are increasingly incorporated into the investment practices of property investment vehicles as part of maturing industry standards.

**School** Business

**Discipline** Investment and Securities

**Student Contribution Band**

Check your fees via the Fees ([https://www.westernsydney.edu.au/currentstudents/current\\_students/fees/](https://www.westernsydney.edu.au/currentstudents/current_students/fees/)) page.

**Level** Undergraduate Level 3 subject

**Equivalent Subjects** FINC 3013

**Restrictions**

This subject is restricted to students enrolled in T047 Property major or 0289 Property minor who have successfully completed 160 credit points before enrolling in this subject.

**Assumed Knowledge**

A sound understanding of commercial property.

## Learning Outcomes

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

1. Explain the strategic significance of property within an institutional investment portfolio both in Australia and globally
2. Apply property performance analysis techniques to evaluate property investments and support investment decision-making for diverse clients
3. Examine the role of investment strategy in property portfolio management
4. Compare key property investment vehicles including their characteristics and structures.

## Subject Content

- Introduction to property portfolio analytics and institutional investment
- The strategic role of property in diversified investment portfolios
- Risk and return characteristics of property investments
- Property performance indicators and risk-adjusted return measures
- Portfolio construction techniques and diversification strategies
- Analytical tools and Excel-based metrics for performance analysis and strategic portfolio construction
- Features, structure and valuation of Real Estate Investment Trusts

- Features and structure of unlisted property funds
- Investment strategy and practical issues in managing property portfolios for diverse cohorts