



Course Specification

(Bachelor)

Course Title: **Investment Analysis**

Course Code: **FIN 317**

Program: **BSC. Finance**

Department: **Department of Economics and Finance**

College: **College of Business Administration**

Institution: **University of Ha'il**

Version: **Version Three**

Last Revision Date : **07 February 2024**



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A. General information about the course:

1. Course Identification

1. Credit hours: (3 Hrs.)

2. Course type

A. ☐ University ☐ College ☒ Department ☐ Track ☐ Others
B. ☒ Required ☐ Elective

3. Level/year at which this course is offered: (6th / Third Year)

4. Course general Description:

This course is designed to provide a sound foundation for the fundamental concepts in investments. Students who master the course material will acquire the analytical tools and financial theory necessary for making investment decisions and understanding the paradigms by which financial securities are valued.

5. Pre-requirements for this course (if any):

FIN 215, FIN 312

6. Co-requirements for this course (if any):

None

7. Course Main Objective(s):

This course offers the financial theory and quantitative tools necessary for understanding how stock, bond, and option prices are determined, and how financial assets are used for investment decisions. Topics covered include modeling the relation between risk and return, optimal portfolio selection based on mean-variance analysis, asset pricing models, money management, practical asset allocation, and more. The focus is mainly on common stocks, but fixed income securities (bonds) and derivative securities (options and futures) are also analyzed.

2. Teaching mode (mark all that apply)

No	Mode of Instruction	Contact Hours	Percentage
1	Traditional classroom	60	100%
2	E-learning	0	0%
3	Hybrid		
	• Traditional classroom	0	0%
	• E-learning	0	0%
4	Distance learning	0	0%





3. Contact Hours (based on the academic semester)

No	Activity	Contact Hours
1.	Lectures	30
2.	Laboratory/Studio	30
3.	Field	N.A.
4.	Tutorial	N.A.
5.	Others (specify)	N.A.
Total		60

B. Course Learning Outcomes (CLOs), Teaching Strategies and Assessment Methods

Code	Course Learning Outcomes	Code of CLOs aligned with program	Teaching Strategies	Assessment Methods
1.0	Knowledge and understanding			
1.1	Recognize general concepts of investment, portfolio management and derivatives market.	K1	Lecture Discussion	Direct: Short Exam Midterm Exam Final Exam Lab Exam Indirect: Course Evaluation survey by students
1.2	Acquire analytical tools and financial theory, and paradigms necessary for making investment decisions and valuating financial securities.	K3	Lecture Discussion Brainstorming (Extra-curricular activities include: Research Project)	Direct: Short Exam Midterm Exam Final Exam Lab Exam Indirect: Course Evaluation survey by students
2.0	Skills			
2.1	Use analytical thinking to identify and evaluate investment related problems.	S2	Lecture Discussion Problem Solving	Direct: Short Exam Midterm Exam Final Exam Lab Exam



Code	Course Learning Outcomes	Code of CLOs aligned with program	Teaching Strategies	Assessment Methods
			(Extra-curricular activities include: Financial Readings)	Indirect: Course Evaluation survey by students
2.2	Show comprehensive, coherent, and systematic body of knowledge related to investment background, portfolio construction and management.	S3	Lecture Discussion Problem Solving	Direct: Short Exam Midterm Exam Final Exam Lab Exam Indirect: Course Evaluation survey by students
2.3	Analyze financial information by applying relevant concepts to suggest innovative decisions.	S4	Lecture Discussion Case study	Direct: Short Exam Midterm Exam Final Exam Lab Exam Indirect: Course Evaluation survey by students
2.4	Evaluate securities by using fundamental and technical analysis in order to form efficient portfolio.	S5	Lecture Discussion Problem Solving (Extra-curricular activities include: Participation in a forum for dialogue and discussion)	Direct: Short Exam Midterm Exam Final Exam Lab Exam Indirect: Course Evaluation survey by students
3.0	Values, autonomy, and responsibility			
3.1	Perform good communication, numerical and analytical skills through project and assignment as well as	V1	Group Research Project Brainstorming Case study (Extra-curricular activities include:	Direct: Presentation Discussion Indirect: Course Evaluation



Code	Course Learning Outcomes	Code of CLOs aligned with program	Teaching Strategies	Assessment Methods
	classroom discussions for local and global issues.		Participation in a forum for dialogue and discussion)	survey by students
3.2	Collaborate in a team to solve a real-life investment problem.	V2	Group Research Project Brainstorming Case study	Direct: Presentation Discussion Indirect: Course Evaluation survey by students

C. Course Content

No	List of Topics	Contact Hours
1.	Background: The investment Environment	6
2.	Financial Markets, Asset Classes & Financial Instruments	9
3.	Mutual Funds & Other Investment Companies	9
4.	Equilibrium in Capital Markets	9
5.	Fixed Income Securities: Analysis, Valuation and Management	9
6.	Options, Futures & Other Derivatives	9
7.	Applied Portfolio Management	9
Total		60

D. Students Assessment Activities

No	Assessment Activities *	Assessment timing (in week no)	Percentage of Total Assessment Score
1.	Short Exam	5 th	5%
2.	Midterm Exam	8 th	30%
3.	Participation in Extra Curriculum Activities	All the semester	5%
4.	Lab Exam	15 th	10%
5.	Final exam	16 th	50%

*Assessment Activities (i.e., Written test, oral test, oral presentation, group project, essay, etc.).

E. Learning Resources and Facilities

1. References and Learning Resources





Essential References	Textbook: “Investments”, by Svi Bodie, Alex Kane, J Marcus, Lorne Switzer, Maureen Stapleton, Dana Boyko, Christine Panasia. 10 th Edition, Published by McGraw Hill Canada, (2022)
Supportive References	Textbook: “Investments: Analysis and Management”, by Gerald R. Jensen, Charles P, Jones. 14 th Edition, Published by Wiley (2019)
Electronic Materials	Library Online Databases of the university http://libsys.uoh.edu.sa:2048/login Blackboard http://www.uoh.edu.sa/MediaCenter/Advertisements/Pages/blackboard-tutorial.aspx
Other Learning Materials	None

2. Required Facilities and equipment

Items	Resources
facilities (Classrooms, laboratories, exhibition rooms, simulation rooms, etc.)	Classrooms equipped with comfortable seats, Specific Laboratory with equipment.
Technology equipment (projector, smart board, software)	Data show, Internet connection & Smart board
Other equipment (depending on the nature of the specialty)	N.A.

F. Assessment of Course Quality

Assessment Areas/Issues	Assessor	Assessment Methods
Effectiveness of teaching	Chairperson & Peers (PAAAP) Class Observation (using class observation form) Students Course Evaluation Survey (CES)	Direct Indirect
Effectiveness of students assessment	Reviewer (Faculty from the same department) Reviewing the exam paper Co-signing the grades Unified Midterm/ Final exams	Direct
Quality of learning resources	Instructor (Course Report)	Direct Indirect



Assessment Areas/Issues	Assessor	Assessment Methods
	Students Course Evaluation Survey (CES)	
The extent to which CLOs have been achieved	<u>Instructor:</u> Direct Method (CLO Assessment Form for all assessment methods)	Direct
	<u>Students:</u> CLOs assessment survey	Indirect

Assessors (Students, Faculty, Program Leaders, Peer Reviewer, Others (specify))

Assessment Methods (Direct, Indirect)

G. Specification Approval

COUNCIL /COMMITTEE	
REFERENCE NO.	
DATE	

