



Course Specification

— (Bachelor)

Course Title: Portfolio Management

Course Code: FIN 422

Program: B.SC. Finance

Department: Department of Economics and Finance

College: College of Business Administration

Institution: University of Hai'l

Version: Version Three

Last Revision Date: 05 February 2024



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A. General information about the course:

1. Course Identification

1. Credit hours: 3Hrs

2. Course type

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

3. Level/year at which this course is offered: (8th)/Fourth Year

4. Course general Description:

This course is designed to provide students with an exposure to the key elements in constructing, managing and diversification of efficient portfolios. The course covers the investment scenario, Risk Return analysis, and various Modern portfolio theories and concepts in portfolio construction, evaluation and assessment.

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

FIN 317 & FIN 320

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

None

7. Course Main Objective(s):

This course aims to develop student knowledge about the concepts of Portfolio management and efficient diversification. It highlights on the investment avenues. Students are oriented with topics pertaining to Risk and Return, Common stock, bond and Mutual fund analysis. It covers construction, evaluation and Assessing Performance of Portfolios.

2. Teaching mode (mark all that apply)

No	Mode of Instruction	Contact Hours	Percentage
1	Traditional classroom	45	100%
2	E-learning	0	0
3	Hybrid <ul style="list-style-type: none"> Traditional classroom E-learning 	0	0
4	Distance learning	0	0

3. Contact Hours (based on the academic semester)

No	Activity	Contact Hours
1.	Lectures	45
2.	Laboratory/Studio	0
3.	Field	0
4.	Tutorial	0
5.	Others (specify)	0
Total		45

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 the Investment environment, Risk and return involving Portfolio Management and Efficient Diversification for investment decisions.	K3	1 Lecture 2.Co-operative Learning 3.Problem solving 4.Presentation	Direct Method:1. Theoretical Final Exam 2.Midterm Exam 3.Short exam (Quizzes) Indirect Method: Students Course Evaluation Survey (CES)
1.2	Describe the concepts of Modern Portfolio and Portfolio theories, CAPM & APT, Market efficiency and Behavioral finance, Common stocks, Bonds, Mutual funds and Exchange traded	K3	1 Lecture 2.Problem solving 3.Presentation	Direct Method: 1. Theoretical Final Exam 2.Midterm Exam Indirect Method: Students Course



Code	Course Learning Outcomes	Code of CLOs aligned with program	Teaching Strategies	Assessment Methods
	funds.			Evaluation Survey (CES)
...				
2.0	Skills			
2.1	Predict the various aspects pertaining to constructing, evaluating and Assessing Portfolio Performance.	S2	1 Lecture 2.Problem solving 3.Presentation	Direct Method: 1. Theoretical Final Exam 2.Midterm Exam Indirect Method: Students Course Evaluation Survey (CES)
2.2	Analyze the problems pertaining to Investments,CAPM & APT, stocks, bonds, Mutual and Exchange traded funds and Portfolio construction, evaluation and performance assessment.	S4	1 Lecture 2.Problem solving 3.Presentation	Direct Method: 1. Theoretical Final Exam 2.Midterm Exam 3.Short exam (Quizzes) Indirect Method: Students Course Evaluation Survey (CES)
2.3	Plan for long term financial/investment decisions undertaken by firms.	S4	1 Lecture 2.Problem solving 3.Presentation	Direct Method: 1. Theoretical Final Exam 2.Midterm Exam Indirect Method: Students Course





Code	Course Learning Outcomes	Code of CLOs aligned with program	Teaching Strategies	Assessment Methods
				Evaluation Survey (CES)
3.0	Values, autonomy, and responsibility			
3.1	Identify ethical dilemmas to various concepts of Portfolio Management.	V1	1.Co-operative Learning 2.Problem solving 3. Presentation	Direct Method: 1.Presentations 2. Discussions Indirect Method: Students Course Evaluation Survey (CES)
3.2	Demonstrate the ability to work independently and as part of a team to make well-informed and effective decisions related to selecting the optimal diversified portfolio of investment.	V2	1. Presentation 2. Discussion 3. Research Project (Extra-Curricular Activity)	Direct Method: 1.Presentations 2.Discussions 3.Research Project (Extra-Curricular Activity) Indirect Method: Students Course Evaluation Survey (CES)

C. Course Content

No	List of Topics	Contact Hours
1.	Chapter 1,2,*5 and *13:Investment Environment, Risk & Return-Portfolio Management and Efficient Diversification	10
2.	Chapter *5 and handouts: Modern Portfolio Concepts-Capital Asset Pricing Model (CAPM) and Arbitrage Pricing Theory (APT)	5





3.	Chapter *9: Market Efficiency, Behavioral Finance and Technical Analysis	5
4.	Chapter *6 & *16: Common Stock & Preferred Stocks	5
5.	Chapter *7 & *8: Analyzing Common Stock	5
6.	Chapter *10 & *11: Fixed Income Securities and Valuation of Bonds	5
7.	Chapter *12: Mutual Funds and Exchange Traded Funds	5
8.	Chapter 8: Constructing and Evaluating Portfolio	
9.	Chapter 9: Assessing Portfolio Performance (combine with Chap 8)	5
Total		45

D. Students Assessment Activities

No	Assessment Activities *	Assessment timing (in week no)	Percentage of Total Assessment Score
1.	Class work, Home work, Discussions	2 nd , 3 rd , 4 th ,10 th , 12 th ,14 th	5%
2.	Research Project, Presentation (Extra-Curricular Activity)	10 th to 13 th	5%
3.	Quizzes	4 th & 14 th	10%
4	Mid Term Exam	8 th	30%
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	*Fundamentals of Investing, Smart and Zutter, Pearson, (2020)14th Edition, ISBN-13: 9780135662212 Fundamentals of Investing, Global Edition, Lawrence Gitman, Pearson, (2019)14th Edition, ISBN-978-1292316970.
Supportive References	Modern Portfolio Theory and investment Analysis; Author- Edwin J. Erwin, Martin J. Gruber, Stephen J. Brown, William N. Goetzmann; Edition- 8 th (2010)., ISBN- 978-0470388327; Publication- Wiley.





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
	http://www.stern.nyu.edu/adamodar
	http://www.bloomberg.com
	http://www.tadawul.com.sa
	http://www.nyse.com
Other Learning Materials	http://www.wsj.com
	NA

2. Required Facilities and equipment

Items	Resources
facilities (Classrooms, laboratories, exhibition rooms, simulation rooms, etc.)	Classrooms
Technology equipment (projector, smart board, software)	Smart Board
Other equipment (depending on the nature of the specialty)	None

F. Assessment of Course Quality

Assessment Areas/Issues	Assessor	Assessment Methods
Effectiveness of teaching	Chairperson & Peers (PAAAP)	Direct In Direct
	Class Observation (using class observation form)	
	Students Course Evaluation Survey (CES)	
Effectiveness of Students assessment	Reviewer (faculty from the same department)	Direct
	Reviewing the exam paper	





Assessment Areas/Issues	Assessor	Assessment Methods
	Co-signing the grades. Unified Mid-term/Final Exams Students Course Evaluation Survey (CES)	In Direct
Quality of learning resources	Instructor (Course Report). Students Course Evaluation Survey (CES)	Direct In Direct
The extent to which CLOs have been achieved	Instructor Direct Method (CLOs Assessment Form for all assessment methods) Students CLOs assessment surveys	Direct In Direct
Other	None	None

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

Assessment Methods (Direct, Indirect)

G. Specification Approval

COUNCIL /COMMITTEE	DEP. COUNCIL OF ECONOMICS AND FINANCE
REFERENCE NO.	NO.03
DATE	11-12-2023





المملكة العربية السعودية
وزارة التعليم
جامعة حائل
كلية إدارة الأعمال
قسم الاقتصاد والتمويل

التاريخ:

1445/04/28 هـ

2023/11/12 م

الموضوع:

محضر مجلس قسم الاقتصاد والتمويل الثالث
للعام الأكاديمي 1444 / 1445 هـ

رقم الموضوع (1)

الموضوع	كافة توصيف المقررات لبرنامج المالية على النموذج المحدث للمركز الوطني للتقويم والاعتماد الوطني 2023 Course Specifications of finance program On the updated form of the National Center for National Evaluation and Accreditation 2023
البرنامج	التمويل
التصنيف	شؤون الجودة
	Finance
	Quality affairs

● مناقشة مجلس القسم:

ناقش مجلس القسم كافة توصيف المقررات لبرنامج المالية على النموذج المحدث للمركز الوطني للتقويم والاعتماد الوطني 2023. وذلك حسب التقرير المرفق.

The department council discussed on course specifications of finance program on the updated form of the National Center for National Evaluation and Accreditation 2023. As per the attached report.

● توصية مجلس القسم:

يوصي مجلس القسم بالموافقة على اعتماد كافة توصيف المقررات لبرنامج المالية على النموذج المحدث للمركز الوطني للتقويم والاعتماد الوطني 2023

The department council recommended approval of course specifications of finance program on the updated form of the National Center for National Evaluation and Accreditation 2023

التوقيع:

● مصادقة رئيس القسم / د. عبد الحميد الشمري



المملكة العربية السعودية
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التاريخ:

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الموضوع:

محضر مجلس قسم الاقتصاد والتمويل الثالث
للعام الأكاديمي 1445 /1444 هـ

• مصادقة أعضاء مجلس القسم على الموضوع (1)

الموضوع رقم	1	اعتماد موضوع / توصيف المقررات 2023 Approval of / course specifications- 2023	التوصية بالموافقة على توصيف المقررات 2023 Agree for / course specifications -2023
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الرقم	الاسم Name	الرقم الوظيفي UOH ID	التصويت Vote		التوقيع Signature
			موافق	غير موافق	
1	رئيس قسم الاقتصاد والتمويل د. عبدالحميد فرحان الشمري	2339580	✓		
2	د. عبدالكريم احمد عامر	7030662	✓		
3	د. محمد سيف الإسلام	7170032	✓		
4	د. إبراهيم عبد الرسول	7190188	✓		
5	د. فخري عالم	7150353	✓		
6	د. رايس احمد	7151492	✓		
7	د. ثاقب منير	7170065	✓		
8	د. مظهر حسين	7190419	✓		
9	د. طاهر اختر	7190412	✓		
10	د. شعيب خان	7180225	✓		
11	د. كوثر حمراي	7151012	✓		
12	د. ريجيس أرونا	7152432	✓		
13	د. عواطف الوحيشي	7190204	✓		
14	د. حبيب حسين خان	7190652	✓		
15	د. هاله الغزالي	7180506	✓		
16	د. وليد سعود الغصائب	2360650	✓		
17	د. سليمان عبدالله	7170062	✓		
18	د. وليد يوسف الشاعر	2340610	✓		