



Course Specification

— (Bachelor)

Course Title: Portfolio Management

Course Code: FIN 431

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 October 2023

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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 and managing 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):

MGT 101 & FIN 325

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. 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 investment decisions.	K2	1 Lecture 2.Co-operative Learning 3.Problem solving 4.Presentation	Direct Method: 1. Theoretical Final Exam 2.Midterm Exam 3.Short exam (Quizzes) 4.Homework/Class work Indirect Method: Students Course Evaluation Survey (CES)
1.2	Describe the concepts of Modern Portfolio and Portfolio theories, Market efficiency and Behavioral finance, Common stocks, Bonds, Mutual funds	K2	1 Lecture 2.Problem solving 3.Presentation	Direct Method: 1. Theoretical Final Exam 2.Midterm Exam 3.Homework Indirect Method:



Code	Course Learning Outcomes	Code of CLOs aligned with program	Teaching Strategies	Assessment Methods
	and Exchange traded funds.			Students Course 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 3.Homework Indirect Method: Students Course Evaluation Survey (CES)
2.2	Analyze the problems pertaining to Investments, stocks, bonds, Mutual and Exchange traded funds and Portfolio construction, evaluation and performance assessment.	S3	1 Lecture 2.Problem solving 3.Presentation	Direct Method: 1. Theoretical Final Exam 2.Midterm Exam 3.Homework 4.Short exam (Quizzes) Indirect Method: Students Course Evaluation Survey (CES)
2.3	Plan for long term financial/investment decisions undertaken	S5	1 Lecture 2.Problem solving	Direct Method: 1. Theoretical Final Exam





Code	Course Learning Outcomes	Code of CLOs aligned with program	Teaching Strategies	Assessment Methods
	by firms.		3.Presentation	2.Midterm Exam 3.Homework Indirect Method: Students Course Evaluation Survey (CES)
3.0	Values, autonomy, and responsibility			
3.1	Demonstrate collaboration, ethical behavior, leadership, and willingness when involved in a teamwork related 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	Show effective self-learning in research and field experience related to selecting the optimal diversified portfolio of investment.	V2	1. Presentation 2. Discussion 3. Research Project	Direct Method: 1.Presentations 2.Discussions 3.Research Project Indirect Method: Students Course Evaluation Survey (CES)

C. Course Content

No	List of Topics	Contact Hours
1.	Chapter 1:Investment Environment	10
2.	Chapter 2:Risk and Return	5





3.	Chapter 3: Modern Portfolio Concepts	5
4.	Chapter 4: Market Efficiency and Behavioral Finance	5
5.	Chapter 5: Analyzing Common Stock	10
6.	Chapter 6: Analyzing Common Stock	5
7.	Chapter 7: Bonds, Mutual Funds and Exchange Traded Funds(combine with Chap 6)	
8.	Chapter 8: Constructing and Evaluating Portfolio	5
9.	Chapter 9: Assessing Portfolio Performance (combine with Chap 8)	
<i>Total</i>		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	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, 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	<i>Library Online Databases of the university -</i>





	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 http://www.wsj.com
Other Learning Materials	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) Class Observation (using class observation form) Students Course Evaluation Survey (CES)	Direct In Direct
Effectiveness of Students assessment	Reviewer (faculty from the same department) Reviewing the exam paper Co-signing the grades.	Direct





Assessment Areas/Issues	Assessor	Assessment Methods
	Unified Mid-term/Final Exams	
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	DEPARTMENT COUNCIL
REFERENCE NO.	NO. 03
DATE	12-11-2023

