



جامعة الزيتونة الأردنية
Al-Zaytoonah University of Jordan

كلية الأعمال
Faculty of Business

"الريادة والأبداع في الأعمال"

"Entrepreneurship and Innovation
in Business"

"عراقة وجودة"
"Tradition and Quality"

Detailed Course Description - Course Plan Development and Updating Procedures/ Banking and Finance Department	QF05/0408-3.0E
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Faculty	Faculty of Business	Department	Department of Banking and Finance
Course number	0503331	Course title	Investment Management
Number of credit hours	3	Pre-requisite/co-requisite	Financial Management (2)

Brief course description

This course aims to help students develop a broad knowledge and understanding of portfolio management and investment analysis.

Students build on the knowledge gained from the Financial Markets and Investment Mathematics core courses in semester one (or Foundations of Finance in the case of A&F students). Students will learn the importance of understanding client objectives in the portfolio management process and understand practical issues that arise in managing client portfolios. We will review a number of investment strategies that have been suggested as having the potential to create superior returns. There will be at least one guest lecture from a portfolio manager

Course goals and learning outcomes	
Goal 1	To introduce students to the basic concepts and principles of investment, especially financial investment.
Learning outcomes	1.1 Provide students with a range of knowledge and skills related to investment and finance concepts such as financial markets, asset pricing, risk, portfolio theory 2.1 The student's knowledge of types and sources of risks and methods of measuring return and risk 3.1 Knowledge of the student types of investment companies and areas of investment
Goal 2	To introduce students to the main methods of evaluation and investment
Learning outcomes	1.2 Student knowledge of the importance of stock and bond indices 2.2 The student's ability to use assessment indicators in problem solving and decision making at the corporate and individual level.
Goal 3	How to make the investment decision and the basic obstacles to the investment process
Learning outcomes	1.3 Knowledge of the student in the global stock markets (to identify the workers in the market, sources of information, buying and selling) 2.3 Student knowledge of the theories of investment diversification, market efficiency, capital asset pricing theories, and performance measurement of portfolios.
Goal 4	Presentation of the most important financial assets in different investment fields
Learning	1.4 Student knowledge of securities indices



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outcomes	2.4 Identify examples of global financial markets 3.4 The student's ability to evaluate securities
Goal 5	Definition of investment portfolios.
Learning outcomes	1.5 Know the concept of investment portfolios 2.5 Student's knowledge about the management of investment portfolios 3.5 Know the risk of personal portfolio management
Goal 6	Presentation of Financial Derivatives
Learning outcomes	1.6 Student knowledge of the concept of financial derivatives 2.6 Student knowledge of the types of derivative contracts
Textbook	1- Investments, by Bodie , Kane, and Marcus, 5 th Ed., McGraw-Hill & Irwin, New Yourk, USA,(2002).
Supplementary references	1- الاستثمار والتحليل الاستثماري، الدكتور دريد كامل آل شبيب، دار اليازوري 2008

Course timeline				
Week	Number of hours	Course topics	Pages (textbook)	Notes
01	1 1 1	The concept and definition of investment management: - The concept of investment - Organizational Structure for Investment Management - Investment decisions - Types of investments - Investment tools	872 – 847 90 – 64	Goal (1)
02	1 1 1	- Return and risk in investments - Return on investment - Types of risks - Risk sources - Measurement of return and risk	872 – 847	Goal (1)
03	1 1 1	- Government funds - Return on financial instruments - Stock market - Ordinary stock market - Financial investment companies and institutions - Investment companies	130 – 103	Goal (1)
04	1 1 1	- Types of investment companies - Areas of investment - Indices of stock and bond markets - derivatives market	--	Goal (1)



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		- Futures contracts - Elective contracts + applied cases		
05	1 1 1	- Financial markets - Types of financial markets	90 – 64	Goal (3)
06	1 1 1	- The efficiency of financial markets	90 – 64	Goal (4)
07	1 1 1	- Securities indices	90 – 64	Goal (4)
08	1 1 1	- Examples of global financial markets	90 – 64	Goal (4)
09	1 1 1	- Financial instruments and valuation of securities	451 – 413	Goal (4)
10	1 1 1	- Money market instruments	451 – 413	Goal (4)
11	1 1 1	- Capital market instruments	695 – 648	Goal (5)
12	1 1 1	- Global Investment - The right to assets in the global portfolios - Distribution of investments in the world - Global investment methods - Exchange rate risk - Negative and positive global investment - The concept of investment portfolios	872 – 848	Goal (5)
13	1 1 1	- Balance in the global financial markets - Investment portfolios	872 – 847	Goal (5)
14	1 1 1	Investment Portfolio Theory - Investment portfolio management	695 – 648	Goal (5)
15	1 1 1	- The risk of personal portfolio management - Role of professionals in risk management		Goal (6)



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16	1 1 1	<ul style="list-style-type: none"> - Financial derivatives - The concept of financial derivatives - Types of derivative contracts <p style="text-align: center;">Final Exam = 50%</p>	Goal (6)
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Theoretical course evaluation methods and weight	Participation = 10% First exam 20% Second exam 20% Final exam 50%	Practical (clinical) course evaluation methods	Semester students' work = 50% (Reports, research, quizzes, etc.) Final exam = 50%
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Approved by head of department	Dr. Nawaf Gusin	Date of approval	
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Extra information (to be updated every semester by corresponding faculty member)

Name of teacher		Office Number	
Phone number (extension)		Email	_____@zug.edu.jo
Office hours			