

Course E-Syllabus

1	Course title	Investment Management
2	Course number	1603322
3	Credit hours	3
	Contact hours (theory, practical)	3
4	Prerequisites/corequisites	Principles of Managerial Finance (1603211)
5	Program title	BA Finance
6	Program code	03
7	Awarding institution	The University of Jordan
8	School	Business School
9	Department	Finance
10	Level of course	BA
11	Year of study and semester (s)	2022-2023 First Semester
12	Final Qualification	BA Finance
13	Other department (s) involved in teaching the course	
14	Language of Instruction	English
15	Teaching methodology	Blended Online ✓ On Campus
16	Electronic platform(s)	✓ Moodle ✓ Microsoft Teams <input type="checkbox"/> Skype <input type="checkbox"/> Zoom <input type="checkbox"/> LMsystem <input type="checkbox"/> Others.....
17	Date of production/revision	09/10/2022

18 Course Coordinator:

Name: Dr. Mohammad Tayeh
Office number: 065355000 ext: 26343
Office Hours: Sun, Tue, Thur. 10:30-11:30 / Mon, Wed, 11:30-12:30
Phone number:
Email: m.tayeh@ju.edu.jo

Note: Please note that this syllabus is a tentative schedule for the course. The procedures, policies, assessments, and calendar are subject to change in the event of extenuating circumstances. Any such changes will be announced in class ("I did not know" will NOT be considered an excuse).

19 Other instructors:

None

20 Course Description:

This course aims at providing the basic concepts of investment management such as: the different types of financial securities (common stocks, preferred stocks and bonds) and the risk and return. In addition, it helps in valuing assets and managing investment portfolios. It also provides the basics of calculating the risk and return for both individual security and investment portfolio. It provides a fundamental explanation of diversification and asset allocation.

21 Course aims and outcomes:

A- Aims:

The aim of this course is to review the basic principles of portfolio theory (Risk and Return). It aims at providing a better understanding of the relationship between risk and return and discusses the impact of diversification and asset allocation on risk. Therefore, it enhances the understanding of the fundamentals of risk, return and risk preferences, and explain the CAPM and its relationship to the SML. It also provides an explanation of the investment process and the issues related to brokers and brokerage accounts. It introduces different types of financial securities and their related characteristics. It also helps students to understand the operations of stock markets and know the key participants in this market. It also explains how bonds and stocks are evaluated. In addition, this course focuses on reflecting the realities of today's changing investment environment, ranging from new investment vehicles to techniques and strategies.

B- Intended Learning Outcomes (ILOs):

Upon successful completion of this course, students will be able to:

1. Show the fundamental knowledge and understanding of various financial concepts such as; risk and return, diversification, asset allocation, etc.
2. Demonstrate an understanding of the investment process, in particular; the workings of short sales.
3. Be able to reflect the basic understanding of the different types of securities (Equity, Futures and Option).
4. Understand the valuation of bonds and stocks.
5. Be able to analyze, at basic level, the difference between various types of interest-bearing assets.
6. Be able to identify the risk and return characteristics of both individual security and a portfolio.
7. Be able to identify the importance of portfolio diversification and asset allocation.
8. Be able to apply the various financial concepts, techniques and procedures in real life examples such as: Optimally diversify portfolios, assessing and measuring the risk and return of financial securities, value assets such as stocks and bonds and manage investment portfolios, figure out when a trading account at a brokerage firm will receive a margin call.
9. Build a solid theoretical and analytical foundation from different concepts and principles gained by this course, upon which the understanding of the advanced financial courses will be built.
10. Constitutes a clear picture about the nature of finance science.

22. Topic Outline and Schedule*:

Week	Lecture	Topic	Teaching Methods*/p latform	Evaluation Methods**	References
1	1.1	Introduction to the course	In Class	Homework Quiz, & Exam	Textbook & class notes
	1.2	Ch.1: A brief History of Risk and Return	In Class		Textbook & class notes
	1.3	Ch.1: A brief History of Risk and Return	In Class		Textbook & class notes
2	2.4	Ch.1: A brief History of Risk and Return	In Class	Homework (1, 2, 5, 6,15) Quiz, & Exam	Textbook & class notes
	2.5	Ch.1: A brief History of Risk and Return	In Class		Textbook & class notes
	2.6	Ch.1: A brief History of Risk and Return	In Class		Textbook & class notes
3	3.1	Ch. 2: Buying and Selling Securities	In Class	Homework, Quiz, & Exam	Textbook & class notes
	3.2	Ch. 2: Buying and Selling Securities	In Class		Textbook & class notes
	3.3	Ch. 2: Buying and Selling Securities	In Class		Textbook & class notes
4	4.4	Ch. 2: Buying and Selling Securities	In Class	Homework (9, 12, 13, 15, 16), Quiz, & Exam	Textbook & class notes
	4.5	Ch. 2: Buying and Selling Securities	In Class		Textbook & class notes
	4.5	Ch. 2: Buying and Selling Securities	In Class		Textbook & class notes
5	5.1	Ch. 3: Security Types	In Class	Homework, Quiz, & Exam	Textbook & class notes
	5.2	Ch. 3: Security Types	In Class		Textbook & class notes
	5.3	Ch. 3: Security Types	In Class		Textbook & class notes
6	6.4	Ch. 3: Security Types	In Class	Homework (5, 7, 12), Quiz, & Exam	Textbook & class notes
	6.5	Ch. 3: Security Types	In Class		Textbook & class notes
	6.5	Ch. 3: Security Types	In Class		Textbook & class notes
7	7.1	Ch.5: The Stock Market	In Class	Homework, Quiz, & Exam	Textbook & class notes
	7.2	Ch.5: The Stock Market	In Class		Textbook & class notes
	7.3	Ch.5: The Stock Market	In Class		Textbook & class notes
8	8.4	Ch.5: The Stock Market	In Class	Homework (10, 11, 12, 14, 16, 17), Quiz, & Exam	Textbook & class notes
	8.5	Ch.5: The Stock Market	In Class		Textbook & class notes
	8.6	Ch.5: The Stock Market	In Class		Textbook & class notes
9	9.1	Ch. 6: Common Stock Valuation	In Class	Homework Quiz, & Exam	Textbook & class notes
	9.2	Ch. 6: Common Stock Valuation	In Class		Textbook & class notes
	9.3	Ch. 6: Common Stock Valuation	In Class		Textbook & class notes

10	10.4	Ch. 6: Common Stock Valuation	In Class	Homework (5, 8, 9, 12, 15, 19), Quiz, & Exam	Textbook & class notes
	10.5	Ch. 6: Common Stock Valuation	In Class		Textbook & class notes
	10.1	Ch. 11: Diversification and Asset Allocation	In Class		
11	11.2	Ch. 11: Diversification and Asset Allocation	In Class	Homework (4, 5, 6, 7, 12, 14, 16), Quiz, & Exam	Textbook & class notes
	11.3	Ch. 11: Diversification and Asset Allocation	In Class		Textbook & class notes
	11.4	Ch. 11: Diversification and Asset Allocation	In Class		Textbook & class notes
12	12.1	Ch. 12: Return, Risk and the Security Market Line	In Class	Homework (2, 3, 6, 12, 13), Quiz, & Exam	Textbook & class notes
	12.2	Ch. 12: Return, Risk and the Security Market Line	In Class		Textbook & class notes
	12.3	Ch. 12: Return, Risk and the Security Market Line	In Class		
13	13.4	Ch. 12: Return, Risk and the Security Market Line	In Class		Textbook & class notes
	13.5	Ch. 12: Return, Risk and the Security Market Line	In Class		Textbook & class notes
	13.6	Ch. 18: Corporate Bonds	In Class		Textbook & class notes
14	14.2	Ch. 18: Corporate Bonds	In Class	Homework (1, 2, 3, 4, 5, 6, 7, 12, 14), Quiz, & Exam	Textbook & class notes
	14.3	Ch. 18: Corporate Bonds	In Class		Textbook & class notes
	14.4	Ch. 18: Corporate Bonds	In Class		
	8	Final exam/Check schedule	On campus		

*Teaching methods include synchronous lecturing/meeting and Asynchronous lecturing/meeting depending on the current discussion of topic's contents.

23. Evaluation Methods:

Opportunities to demonstrate achievement of the ILOs are provided through the following assessment methods and requirements:

Evaluation Activity	Mark	Topic(s)	Period (Week)	Platform
Mid-term Exam / Short Exams*	30%	TBA	To be announced	On campus
Course work**	20%	TBA	To be announced	On campus & Moodle
Final Exam	50 %	TBA	To be announced	On campus

*Mid-term exam will be held either in the campus or online which depends on the Policies and Regulations issued by the University.

** Course work includes two or more of the following: participation, online quizzes, oral quizzes, assignments, projects, or any type of assessment allowed by the regulations.

24. Course Requirements (e.g: students should have a computer, internet connection, webcam, account on a specific software/platform...etc):

Students should have a computer, internet connection, webcam, microphone and accounts on the electronic platforms used in this module.

25. Course Policies:

- A- Attendance policies: Students are not allowed to miss more than 15% of the classes during the semester. Failing to meet this requirement will be dealt with according to the university disciplinary rules.
- B- Absences from exams and submitting assignments on time: **No** Make Up Exams will be held if the student failed in providing approved absence form signed by the dean or the Assistant Dean for Students affairs.
- C- Health and safety procedures: Students must follow the University of Jordan health instruction.
- D- Honesty policy regarding cheating, plagiarism, misbehavior: Cheating or Plagiarism will be treated according to the University's rules and regulations.
- E- Grading policy: According to The university grading requirements
- F- Available university services that support achievement in the course: Platforms

26. References:

A- Required book(s), assigned reading and audio-visuals:

Jordan, Miller and Dolvin, *Fundamentals of Investments: Valuation and Management*, 8th edition, International Edition, McGraw-Hill.

B- Recommended books, materials and media:

Corrado, Charles and Jordan, *Fundamentals of Investments (2002)*, 2nd Edition, International Edition, McGraw-Hill.

Gitman and Joehnk, *Fundamentals of Investing (1999)*, 7th Edition, Addison Wesley.

27. Additional information:

None

Name of Course Coordinator: Dr. Mohammad Tayeh Signature _____ Date: 09/10/2022
Head of Curriculum Committee/Department: ----- Signature: -----
Head of Department: ----- Signature: -----
Head of Curriculum Committee/Faculty: ----- Signature: -----
Dean: ----- Signature: -----