



Ministry of Higher Education and Scientific Research  
Lebanese French University – Erbil  
College of Administration & Economics  
Department of Business Administration



# Investment & Portfolio Management

**Fourth Stage – First Semester**

**Asst. Prof. Sohail Imran Khan**

**Academic Year: 2024-2025**

**Course Book**



S. No.	Information	Details
1.	Course Name	Investment and Portfolio Management
2.	Course Code	BA401IPM
3.	Lecturer In-charge	Dr. Sohail Imran Khan
4.	College/Department	Administration and Economics/Business Administration
5.	Contact Information	sohailkhan@lfu.edu.krd
6.	Time (in hours) per Week	3 Hours
7.	Office Hours	Thursdays 12:00-3:00
8.	Teacher's Academic Profile	<a href="https://lfu.edu.krd/personnel/sohail-imran-khan/">https://lfu.edu.krd/personnel/sohail-imran-khan/</a>
9.	Academic Title	Assistant Professor
10.	Keywords	Investment, Management, Portfolio, Stocks
11.	<p><b>Course Overview:</b></p> <p>The "<b>Investment and Portfolio Management</b>" course provides an in-depth understanding of the principles and practices essential for managing investments and portfolios. Students will explore key concepts such as risk and return analysis, asset allocation, portfolio construction, and diversification strategies. The course emphasizes the application of modern portfolio theories and tools for effective decision-making in investment management. By the end of the course, students will be equipped with the knowledge and skills to develop and manage investment portfolios that align with specific financial goals and risk tolerance levels.</p>	
12.	<p><b>Aims &amp; Objective:</b></p> <p>The Investment and Portfolio Management course aims to equip students with the knowledge and skills to effectively manage investments and construct portfolios, enabling them to make informed and strategic financial decisions.</p>	



	<p><b>Objectives:</b></p> <ol style="list-style-type: none"> <li>1. Provide students with a solid understanding of fundamental investment concepts, including risk, return, and asset allocation.</li> <li>2. Develop students' skills in constructing and managing diversified investment portfolios using modern portfolio management techniques.</li> <li>3. Equip students with the ability to analyze and evaluate portfolio performance, making informed adjustments to achieve financial objectives.</li> <li>4. Foster ethical and strategic decision-making in the context of investment management.</li> </ol>
13.	<b>Course Requirement: Core Course</b>
14.	<p><b>Teaching and Learning Method:</b> The module will be delivered to the students using modern technology, case studies, reading material, flipped classroom, video, and case analysis. The student-centered approach will be applied—the strategies to be implemented to target students learning outcomes.</p>
15.	<p><b>Assessment Scheme:</b></p> <ul style="list-style-type: none"> <li>▪ 25 % Mid-term Examination</li> <li>▪ 15 % Assignments and Quizzes</li> <li>▪ 60 % Final Examination</li> </ul>
16.	<p><b>Student Learning Outcome:</b></p> <p>At the end of this course, the student will be able to:</p> <ul style="list-style-type: none"> <li>▪ Understand and apply key investment principles, including risk and return, asset classes, and the impact of economic factors on investment decisions.</li> <li>▪ Construct and manage diversified portfolios using modern portfolio theories and techniques to optimize asset allocation.</li> <li>▪ Analyze and evaluate the performance of investment portfolios, making informed decisions about adjustments and rebalancing to enhance portfolio returns.</li> <li>▪ Apply ethical and strategic investment practices in professional settings.</li> </ul>
17.	<b>Course Reading List and References</b>



**Course Reading List and References:**

- Investment Analysis and Portfolio Management, 8th edition, by Zvi Bodie, Alex Kane, and Alan J. Marcus, McGraw Hill, 2011.
- Advanced Portfolio Management: A Quant's Guide for Fundamental Investors 1st Edition, by Giuseppe A. Paleologo. Wiley, 2021.
- The New Dynamic of Portfolio Management: Innovative Methods and Tools for Rapid Results, by Murali Kulathumani, J. Ross Publishing, 2021
- Investment Analysis and Portfolio Management, 10th Edition, by Frank Reilly and, Keith Brown, Cengage Learning, 2011.

<b>18.</b>	<b>Course Content</b>
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**Course Content**

S. No.	Lecture Week	No. of Hours	Topics
1.	Week 1	3	Meaning of Investment, Define Investment, Concept of Investment: Economic Investment and Financial Investment
2.	Week 2	3	Elements of Investments, Objectives of Investment,
3.	Week 3	3	Common Investing Mistakes to Avoid, Tips to Avoid Investment Mistakes, Emerging Trends in Investment, Ethics in Investment Management.
4.	Week 4	3	Return on Investment + Numerical

5.	Week 5	3	Speculation, Difference between Investor and Speculator, Role of Speculators in Financial Markets.
6.	Week 6	3	How should be Investment done?, Types of Investment.
7.	Week 7	3	Shares, Types of Shares, Differences between Equity Shares & Preference Shares



8.	Week 8	3	Bank Deposits, Important Features of Bank Deposit Account, Advantages & limitations of Bank Deposits, Power of Compounding + Numerical
9.	Week 9	3	<b>MIDTERM</b>
10.	Week 10	3	Portfolio, Types of Portfolios, Modern Portfolio Theory (MPT).
11.	Week 11	3	What is Portfolio Risk Management? Strategies for Portfolio Management
12.	Week 12	3	Portfolio Management, Definition, Key Terms, Active Vs Passive Management.
13.	Week 13	3	<b>PRESENTATION</b>
14.	Week 14	3	Need, Objectives. Who Should Opt for Portfolio Management?, Portfolio Management Process,
15	Week 15	3	Principles of Portfolio Management, Advantages & Disadvantages of Portfolio Management, Common Challenges faced in Portfolio Management.
16	Week 16	3	Who is a Portfolio Manager? Skills of a Portfolio Manager, Financial Planner, Duties and Responsibilities, Financial Planning Process
17.			<b>Final Examination</b>

19.	<p><b>Examinations:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Define Portfolio Management</b></li> <li>▪ <b>List the common objectives of Investment</b></li> <li>▪ <b>Differentiate between Investor and Speculator</b></li> </ul>
20.	<p><b>Course Policy:</b></p> <ul style="list-style-type: none"> <li>▪ There will be many activities going on throughout the course period to ensure and guarantee the learning outcomes. Therefore, students are expected to pay full attention and participate in all classroom activities to maximize their learning and understanding.</li> </ul>
21.	<p><b>Note:</b></p> <ul style="list-style-type: none"> <li>▪ Seek help from the lecturer or your classmates whenever you need to.</li> <li>▪ Time spent in learning is never wasted, however, make sure that you make it enjoyable.</li> </ul>



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|  | <ul style="list-style-type: none"><li>▪ Keep a personal notebook to write down your notes in the lectures. Don't rely on your friend's notes as each one of you is different and has different learning approaches.</li></ul> |
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