



SYLLABUS: INVESTMENT PORTFOLIO MANAGEMENT

Warith Alanbiyaa University, College OF ADMINISTRATION AND ECONOMICS

Second Semester, 2024-2025

INSTRUCTOR: HEBAT ALLAH MUSTAFA

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Hours:3

DEPARTEMENT: Business
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COURSE OVERVIEW

Contents included:

Investing in securities is one of the aspects of economic activities that plays an important role in the economy. The investor by nature seeks to maximize his benefit by increasing returns and reducing risk, and in order for this condition to be fulfilled, the investor must study and analyze the investment decision carefully and precisely. Therefore, the investor seeks to build the investment portfolio, which is the most important investment tool that meets the needs of investors. The main purpose of building this investment portfolio is to apply the policy of diversification when choosing the components of the portfolio as an input or as an effective method to reach the optimum portfolio.

GOALS AND OBJECTIVES

The investment portfolio management study aims to identify an introduction to the fundamentals of investment and investment portfolios, their types, management policies, methods of measuring and evaluating returns, market efficiency, practical examples of managing all portfolios, how to reduce risks that affect returns, standards and models for evaluating the performance of portfolio managers, diversification Investment portfolio, and learning about international portfolios.

Sources :

First: Arabic books

- 1- المومني, غازي فلاح , إدارة المحافظ الاستثمارية الحديثة , دار المناهل للطباعة والنشر والتوزيع , 2013.
- 2- محمد مطر, فايز تيم, إدارة المحافظ الاستثمارية, دار وائل للطباعة والنشر والتوزيع, 2005
- 3- العامري, محمد علي ابراهيم , إدارة محافظ الاستثمار, دار وائل للطباعة والنشر والتوزيع , 2013 .

Second: English books:

- 1- Bodie, Zvi, & Kane, Marcus, Alan J., Investments And Portfolio Management , 9th Edition, Mcgraw -Hill, USA, 2011.
- 2- Elton ,Edwin J.& Gruber, Martin J.,& Brown, Stephen J., Goetzmann, William N. , Modern Portfolio Theory And Investment Analysis, 9th Edition, Printed In The United States Of America, 2014.

COURSE REQUIREMENTS

The course grade will be based on the following elements:

Week	Details	Degree
During the fifteen weeks	Attend and participate	10
Fifth	Daily electronic exams	10
Seventh	Electronic monthly exam	15
Fifteenth	Monthly electronic exam	15
Total		50

Examinations: The exam is divided into daily and monthly tests. Monthly exams are designed to assess the student's knowledge of understanding the material in order to address their weaknesses and enhance their strengths.

Participation: The aim of the participation is to enhance the method of dialogue and answer questions about the material in order to evaluate the scientific content of the respondent.

Attendance: Attendance and commitment within the hall is evidence of respect and interest of the respondent in the scientific material.

EXPECTATIONS FROM STUDENT

Attend class: attendance is not optional. Keep up on all readings. Bring reading materials to class. Turn in all assignments. Participate in discussions. Be familiar with email and check it regularly. Check the class web site regularly for assignments and updates. Be thoughtful and civil to classmates and the instructor. Please do not eat in class. Turn off phones. Use of electronic devices (including computers) during class must be approved by the instructor.

GENERAL POLICIES

ACADEMIC INTEGRITY

Academic integrity is the student's commitment to high literary values and educational honesty in order to achieve his academic success in a responsible manner. We do not forget that education is an investment for your future. Academic integrity is the heart of society and its basic building block, and it determines the credibility of people in their dealings with each other, and in the trust of community members to officials in higher positions and positions..

ASSIGNMENT SCHEDULE

WK	TOPIC	READING	TIME
1	Introduction to investment basics	The concept of investing	2 hours
	Fundamentals of investment	Fundamentals of investment	1 hour
2	Risk and return basics	Practical examples, exercises and applications	2 hours
	Definition of the nature and types of risk	Principles of investment	1 hour
3	Valuation of common stock	Types of investments	2 hours
	Ordinary shares	Practical examples, exercises and applications	1 hour
4	Bond valuation	1- The concept of return	2 hours
	Bonds	2- Types of return	1 hour
5	Market efficiency	Calculate the yield	2 hours
		Practical examples, exercises and applications	1 hour
6		3- The concept of risk	2 hours
	Behavioral Finance	4- Types of risk	1 hour
7	Measuring portfolio risk and return	The risk calculation for a security	2 hours
	Monthly exam	Practical examples, exercises and applications	1 hour
8	Portfolio management	1- The concept of common shares	2 hours
	Investment portfolios	2- Classification of common shares	1 hour
9	The diversification base in the investment portfolio	3- Concepts of value for ordinary shares	2 hours
	Portfolio diversification	4-	1 hour
10	Financial asset pricing model	Practical examples, exercises and applications	2 hours
	Investment portfolio evaluation models	Common Equity Valuation Models	1 hour
11	Investment portfolio methods	Practical examples, exercises and applications	2 hours
	Measuring the performance of investment portfolios	1- Bond Basics	1 hour
12	Measuring the performance of investment portfolios	2- Types of bonds	2 hours
	Measuring the performance of investment portfolios	3- Bond evaluation mechanism	1 hour
13	Monthly exam	The classical theory of interest rates	2 hours
	Practical examples, exercises and applications	Practical examples, exercises and applications	1 hour
14		4- Duration and risk	2 hours
	Financial derivatives	Allow the risk of default (credit risk)	1 hour
15	Derivatives markets	Practical examples, exercises and applications	2 hours
	Full review	1- Introduction to Efficient Capital Market	1 hour