

Summary Information

Module Code	7004LBSIF
Formal Module Title	Portfolio Management
Owning School	Business and Management
Career	Postgraduate Taught
Credits	20
Academic level	FHEQ Level 7
Grading Schema	50

Teaching Responsibility

LJMU Schools involved in Delivery
Business and Management

Learning Methods

Learning Method Type	Hours
Lecture	22
Workshop	11

Module Offering(s)

Display Name	Location	Start Month	Duration Number Duration Unit
SEP-MTP	MTP	September	12 Weeks

Aims and Outcomes

Aims	To develop students' understanding of theories and practices in investment and portfolio management at an advanced level.
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After completing the module the student should be able to:

Learning Outcomes

Code	Number	Description
MLO1	1	Reflect upon the investment objectives of both individual and institutional investors, and describe the economic perspectives of the capital market.
MLO2	2	Apply investment and portfolio management skills to optimise investors' objectives with the analysed results of market conditions.
MLO3	3	Analyse different asset class investments including equity, fix-income security, and alternative asset classes.
MLO4	4	Critically evaluate the portfolio performance in different measures to account for rebalancing needs, and to provide feedback control for portfolio.

Module Content

Outline Syllabus	Investment policy statement.Economic perspective of the capital market.Capital allocation and passive portfolio management strategy.Fixed income securities management.Alternative assess classes investment.Capital allocation and active portfolio management strategy.Portfolio performance evaluation and feedback control.
Module Overview	
Additional Information	In this module, students will learn the skills of investment and portfolio management. The topic is highly quantitative in its nature. The students are expected to be able to appreciate the complexity in managing various investment needs in the financial market.Frequent practice and exposure to financial databases is necessary for the good understanding of these topics. Financial databases such as Bloomberg will also enhance a students potential for a career in finance. The Bloomberg system will be utilised as a data source as well as an optimisation tool within this module.

Assessments

Assignment Category	Assessment Name	Weight	Exam/Test Length (hours)	Module Learning Outcome Mapping
Test	Computer Based Test	30	0	MLO2, MLO3
Report	Individual Report	70	0	MLO1, MLO2, MLO4

Module Contacts

Module Leader

Contact Name	Applies to all offerings	Offerings
Fan Zhang	Yes	N/A

Partner Module Team

Contact Name	Applies to all offerings	Offerings
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