

The Hashemite University  
Faculty of Economics and Administrative Sciences  
Department of Banking and Financial Sciences  
Investment Management / 1802041312  
Fall-Semester 2018-2019

## **Course Syllabus**

### **Contact Information**

Instructor : Dr. Mohammad Q.M. Momani

Office hours : Sunday, Tuesday, and Thursday 11:00 - 12:00, Monday and Wednesday 12:30 - 13:30.

Office location : Faculty of Economics & Administrative Sciences - Department of Banking & Financial Sciences - 3rd floor - Room 317

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### **Course Description**

This course is an introductory investment course that focuses on practical applications as well as analytical analyses of investment theories. It provides the basic knowledge about financial markets, valuation of investment tools, and different investment strategies. Those students who want to start a career as investment professionals or who want to improve their decision-making as individual investors will find this course very useful. The major topics include financial markets and instruments, portfolio theory, valuation of equity and fixed-income securities, and the process of active investment management.

### **Learning Objectives**

By the end of this module students should be able to

- Understand the characteristics of different financial assets such as money market instruments, bonds, and stocks, and how to buy and sell these assets in financial markets.
- Understand the benefit of diversification of holding a portfolio of assets, and the importance played by the market portfolio.
- Know how to apply different valuation models to evaluate fixed income securities, stocks, and how to manage their investment risks.

## **Required Material**

Lecture notes and required readings will be posted on the course website in advance. These notes are not a complete record of what I discuss in class, but serve as an outline for developing the concepts while still requiring active learning. Please note that I will occasionally update previous lecture notes for corrections and clarifications. In addition, I will provide sample questions following every lecture. These are not to be turned in, but I highly recommend you to work on them.

## **Text Book**

Bodie, Z, Kane, A., and A. J. Marcus, 2010, "Essentials of Investments", 8th Edition, McGraw-Hill Inc, New York .

## **Assessment**

|                     |            |
|---------------------|------------|
| First Exam          | : 25 marks |
| Second Exam         | : 25 marks |
| Assignments         | : 5 marks  |
| Class Participation | : 5 marks  |
| Final Exam          | : 40 marks |

## **Assignments**

There will be two assignments. The assignments must be completed individually. You are allowed to talk to and discuss the assignments with other classmates, but the work has to be completed separately. No late submission will be accepted.

## **Class Participation**

You are expected to attend lectures, ask questions, and participate in the discussions. At the end of the term, I ask you to self evaluate your class participation on a scale from 0 (poor) to 5 (excellent), and justify your choice in three to five sentences. Please don't be shy, I expect you

to give yourself a very high score. I do, however, reserve the right to disagree with your self-evaluation.

### **Course Policies**

- Please turn off any sounds on phones before class. I strongly discourage the use of your phone during class for anything unrelated to the lecture. Do not distract the students around you with your activities.
- No late assignments or make up test accepted without prior approval and/or documentation.

### **Course Outline**

|            |  |
|------------|--|
| Chapter 1  | : "Investments: Background and Issues"           |
| Chapter 2  | : "Asset Classes and Financial Instruments"      |
| Chapter 3  | : " Securities Markets"                          |
| Chapter 4  | : " Mutual Funds and Other Investment Companies" |
| Chapter 5  | : " Risk and Return: Past and Prologue"          |
| Chapter 10 | : " Bond Prices and Yields"                      |
| Chapter 13 | : " Equity Evaluation "                          |
| Chapter 22 | : " Investors and Investment Process "           |

**All information contained within this syllabus is subject to change.**