

Course Description Template: Investment Portfolio Management

1.	Course Name:	
		Investment Portfolio Management
2.	Course Code:	
		WBA-42-04
3.	Semester/Year:	
		Second Session
4.	Date of preparation of this description:	
		15/9/2025
5.	Available Forms of Attendance:	
		Physical + electronic (when needed)
6.	Number of Hours (Total) / Number of Units (Total):	
		3 Hours / 3 Units
7.	Course Administrator Name	
		Name: Assoc. Prof. Dr. Hebatullah Mustafa Al-Sayed Ali Email: Hebatallah.Mu@g.uowa.edu.iq
8.	Course Objectives	
	<ul style="list-style-type: none"> ✓ Introduce the student to the basics of investment, types of investment portfolios and their management policies. ✓ Enable the student to measure and analyze the return and risk of securities (stocks and bonds) and investment portfolios. ✓ Providing the student with the skill of building optimal investment portfolios through the application of the principle of effective diversification. ✓ Train the student to use different evaluation models (e.g., Sharp, Trainor, Jensen) to measure portfolio performance. ✓ Understand the concepts of market efficiency and behavioral finance and their impact on investment 	Course Objectives

decisions.

9. Teaching and Learning Strategies

- ✓ Theoretical lectures to explain financial concepts and models.
- ✓ Exercises and practical application sessions to enhance mathematical and analytical skills.
- ✓ Classroom discussions and dialogue to promote a deep understanding of the material.
- ✓ Analyze practical case studies to understand how theories are applied in reality.

Strategy

10. Course Structure

Evaluation Method	Learning Method	Name of Unit or Topic	Required Learning Outcomes	Hours	Week
Classroom Participation	Lecture + Exercises	Chapter One: Fundamentals of Investment (Concept, Principles, Types).	Understand the basic concepts and principles of investment and its types.	3	1
Classroom Participation	Lecture + Exercises	Chapter Two: Return and Risk (Concepts, Types, and Calculation Methods).	Measure the return and risk of individual assets.	3	2
duty	Lecture + Exercises	Chapter Three: Valuation of Common Shares.	Valuation of common stocks using different models.	3	3
Classroom Participation	Lecture + Exercises	Chapter Four: Valuation of Bonds.	Evaluating bonds and understanding their relationship to interest rates.	3	4
Daily exam	Lecture + Discussion	Chapter Five: Capital Market Efficiency and Behavioral Finance.	Understand the assumptions of market efficiency and the impact of behavioral finance.	6	5-6
First monthly exam	Lecture + Exercises	Chapter Six: Measuring the Return and Risk of the Investment Portfolio.	Measure the return and risk of a portfolio of two or more assets.	3	7
duty	Lecture + Exercises	Chapter Seven: Building Investment Portfolios and the Principle of Diversification.	Understand how to build portfolios and apply the principle of diversification to reduce risk.	6	8-9
Classroom Participation	Lecture + Exercises	Chapter Eight: Asset Valuation and Portfolio	Apply asset valuation and portfolio	9	10-12

		Performance Models (CAPM, Sharpe, Treynor, Jensen).	performance measurement models.		
Exam score	Electronic Exam	The second monthly exam.	A comprehensive assessment of the student's understanding of the advanced topics.	3	13
Classroom activity	Case Study + Discussion	Practical applications and a comprehensive case study.	Apply the concepts to an integrated process case.	3	14
Oral questions	Lecture + Review	Chapter Nine: Introduction to Financial Derivatives and a Comprehensive Review.	Identify financial derivatives and review the material.	3	15

11. Course Evaluation

Distribute the score out of 100 according to the tasks assigned to the student, such as daily preparation, daily, oral, monthly, and written exams, and reports..... etc

I. Attendance and participation 10 degrees

II. Daily Exams 10 degrees

III. First Monthly Exam 15 degrees

IV. Second Monthly Exam 15 degrees

Final Exam: 50

V. Total = 100 Marks

12. Learning and Teaching Resources

1. Al-Momani, Ghazi Falah, **Modern Investment Portfolio Management**, Dar Al-Manahil, 2013.
2. Mohamed Matar, Fayeze Team, **Investment Portfolio Management**, Dar Wael, 2005.
3. Al-Ameri, Mohamed Ali Ibrahim, **Investment Portfolio Management**, Dar Wael, 2013.
- 4- Bodie, Zvi, & Kane, Marcus, Alan J., Investments And Portfolio Management, 9th Edition, Mcgraw-Hill, USA, 2011.**

Required Textbooks