







Finance (FNCE) 470

Portfolio Management (Revision 3)

Status:	Replaced with new revision, see the course listing  for the current revision 
Delivery mode:	Individualized study online 
Credits:	3
Area of study:	Applied Studies (Business and Administrative Studies)
Prerequisites:	FNCE 300/ECON 300 (formerly FNCE 234) or FNCE 370 . MATH 260 or equivalent is recommended.
Precluded:	None
Challenge:	FNCE 470 has a challenge for credit option.
Faculty:	Faculty of Business 
Notes:	Students registering in grouped study are advised that there may be some differences in the evaluation and course materials information indicated below. To obtain the most up-to-date

information, contact the Faculty of Business
Student Support Centre at 1-800-468-6531.

Overview

The course examines the theory and practice of investment and portfolio management. Successful completion of the course will allow students to make use of available information on financial markets, at both the macro and micro levels. It will also give students the ability to construct an investment portfolio that is sound in terms of investment principles and portfolio performance.

When you successfully complete this course you will be

- familiar with the theory and practice of investment and portfolio management
- able to make use of available information on financial markets, at both macro and micro levels
- able to construct an investment portfolio that is sound in terms of investment principles and portfolio performance.

Outline

- Unit 1: Investment Background
- Unit 2: Developments in Investment Theory
- Unit 3: Valuation Principles and Practices
- Unit 4: Analyzing and Managing Common Stocks
- Unit 5: Analyzing and Managing Bonds
- Unit 6: Derivative Securities Analysis
- Unit 7: Defining and Evaluating Asset Management

Evaluation

To **receive credit** [↗](#) for FNCE 470, you must complete a research paper and a Final Examination. You must achieve a minimum grade of D (50 percent) on the Final Examination, and an overall course grade of **D (50 percent)** [📄](#). The following chart describes the credit weight associated with each course requirement.

Activity	Weight
Term Paper	50%
Final Online Exam	50%
Total	100%

To learn more about assignments and examinations, please refer to Athabasca University's **online Calendar** [↗](#).

Materials

Digital course materials

Links to the following course materials will be made available in the course:

Reilly, F. K., & Brown, K. C. (2012). *Investment analysis and portfolio management* (10th ed.). Mason, OH: South-Western, Cengage Learning.
ISBN 978-0-538-48238-7

Other Resources

All other learning resources will be available online.

Challenge for credit

Overview

The challenge for credit process allows you to demonstrate that you have acquired a command of the general subject matter, knowledge, intellectual and/or other skills that would normally be found in a university-level course.

Full information about **challenge for credit** [↗](#) can be found in the Undergraduate Calendar.

Evaluation

To **receive credit** [↗](#) for the FNCE 470 challenge registration, you must achieve a grade of at least **“D” (50 percent)** [📎](#) on the examination.

- Online Exam (3 hours)

[📎](#) **Challenge for credit course registration form**

Important links

- › [Academic advising](#) [↗](#)
- › [Program planning](#) [↗](#)
- › [Request assistance](#) [↗](#)
- › [Support services](#) [↗](#)

Athabasca University reserves the right to amend course outlines occasionally and without notice. Courses offered by other delivery methods may vary from their individualized study counterparts.

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