



AYDIN ADNAN MENDERES UNIVERSITY COURSE INFORMATION FORM

Course Title		Financial Investment Analysis and Portfolio Management							
Course Code		İMF501		Couse Level		Second Cycle (Master's Degree)			
ECTS Credit	5	Workload	127 (<i>Hours</i>)	Theory	3	Practice	0	Laboratory	0
Objectives of the Course		At the end of this course the student investment vehicles, capital markets, money markets, risk and risk types, are effectively understand the market, portfolio building, practical portfolio management, fundamental analysis ability, understanding of technical analysis, portfolio performance measure and its variants will be capable of understanding.							
Course Content		Capital Markets, Money Markets, Stocks, bonds and other financial instruments, examination, creation techniques, dispersion techniques, applications (with samples from Turkey and the world capital markets).							
Work Placement		N/A							
Planned Learning Activities and Teaching Methods				Explanation (Presentation), Discussion					
Name of Lecturer(s)		Prof. Yusuf KADERLİ							

Assessment Methods and Criteria

Method	Quantity	Percentage (%)
Midterm Examination	1	40
Final Examination	1	60

Recommended or Required Reading

1	Mehmet Baha Karan, Yatırım Analizi ve Portföy Yönetimi, Gazi Kitabevi, 2001.
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Week	Weekly Detailed Course Contents	
1	Theoretical	Characteristics of Financial Assets
	Preparation Work	Investment Analysis and Portfolio Management, M. Ranganatham, R. Madhumathi, Dorling Kindersley Ltd, Singopare, 2005.
2	Theoretical	Financial Markets, Investment Types and Properties
	Preparation Work	Investment Analysis and Portfolio Management, M. Ranganatham, R. Madhumathi, Dorling Kindersley Ltd, Singopare, 2005.
3	Theoretical	Hedgers
	Preparation Work	Investment Analysis and Portfolio Management, M. Ranganatham, R. Madhumathi, Dorling Kindersley Ltd, Singopare, 2005.
4	Theoretical	The Secondary Market
	Preparation Work	Investment Analysis and Portfolio Management, M. Ranganatham, R. Madhumathi, Dorling Kindersley Ltd, Singopare, 2005.
5	Theoretical	Stock Management and Control
	Preparation Work	Investment Analysis and Portfolio Management, M. Ranganatham, R. Madhumathi, Dorling Kindersley Ltd, Singopare, 2005.
6	Theoretical	Types of Financial Intermediation
	Preparation Work	Investment Analysis and Portfolio Management, M. Ranganatham, R. Madhumathi, Dorling Kindersley Ltd, Singopare, 2005.
7	Theoretical	Investment Opportunities
	Preparation Work	Investment Analysis and Portfolio Management, M. Ranganatham, R. Madhumathi, Dorling Kindersley Ltd, Singopare, 2005.
8	Intermediate Exam	Midterm Exam
9	Theoretical	Tools and Debt Valuation of Debt Instruments
	Preparation Work	Investment Analysis and Portfolio Management, M. Ranganatham, R. Madhumathi, Dorling Kindersley Ltd, Singopare, 2005.
10	Theoretical	Tools and Valuation of Bonds
	Preparation Work	Investment Analysis and Portfolio Management, M. Ranganatham, R. Madhumathi, Dorling Kindersley Ltd, Singopare, 2005.
11	Theoretical	And Valuation of Derivatives
	Preparation Work	Investment Analysis and Portfolio Management, M. Ranganatham, R. Madhumathi, Dorling Kindersley Ltd, Singopare, 2005.
12	Theoretical	Portfolio Selection



12	Preparation Work	Investment Analysis and Portfolio Management, M. Ranganatham, R. Madhumathi, Dorling Kindersley Ltd, Singopare, 2005.
13	Theoretical	Portfolio Management
	Preparation Work	Investment Analysis and Portfolio Management, M. Ranganatham, R. Madhumathi, Dorling Kindersley Ltd, Singopare, 2005.
14	Theoretical	Portfolio Performance Forecasting
	Preparation Work	Investment Analysis and Portfolio Management, M. Ranganatham, R. Madhumathi, Dorling Kindersley Ltd, Singopare, 2005.
15	Preparation Work	Investment Analysis and Portfolio Management, M. Ranganatham, R. Madhumathi, Dorling Kindersley Ltd, Singopare, 2005.
16	Final Exam	Final Exam
17	Final Exam	Final Exam

Workload Calculation

Activity	Quantity	Preparation	Duration	Total Workload
Lecture - Theory	14	2	3	70
Midterm Examination	1	25	1	26
Final Examination	1	30	1	31
Total Workload (Hours)				127
[Total Workload (Hours) / 25*] = ECTS				5

*25 hour workload is accepted as 1 ECTS

Learning Outcomes

1	Students gain the ability to understand financial theories
2	The student portfolio building, practical portfolio management, fundamental analysis ability, their ability to gain understanding of technical analysis.
3	Derivatives of the student's ability to gain understanding.
4	
5	

Programme Outcomes (Finance and Accounting Masters)

1	To be able to integrate fundamental accounting and auditing knowledge with related branches of the law.
2	To be able to use technical and practical knowledge regarding the establishment and development of cost systems in practice.
3	To be able to consider ethic values and social responsibility in the decisions in business life.
4	Be able to take initiative and solve problems using analytic and creative approaches and manage risks in the changing business conditions.
5	To be able to associate the subtle movements in the securities and organized financial markets with human psychology and analyze the relationship.
6	Be able to improve the system in which he/she is engaged by integrating the theoretical knowledge with practice (be able to understand and interpret the problems of the profession and express ideas in a succinct and precise manner.)
7	To be able to analyze and interpret developments in the derivative products, foreign exchange markets and financial markets and perform transactions using derivative products.
8	To be able to use mathematical and statistical knowledge in order to employ fundamental finance principles in the decision making process. Be able to use econometric models in accounting and finance and testing them using actual data in the financial markets.
9	To be able to recognize the international financial management tools, international financial markets, and intermediary organizations and entities and make use of this knowledge in the financial management of a firm.
10	To be able to evaluate the cause and effect relations of the local and global crisis and be able to make decisions based on knowledge in the conditions of crisis.

Contribution of Learning Outcomes to Programme Outcomes 1:Very Low, 2:Low, 3:Medium, 4:High, 5:Very High

	L1	L2	L3	L4	L5
P1	4	4	3	3	3
P2	3	3	3	3	4
P3	2	4	5	2	2
P4	4	2	4	2	2
P5	5	5	4	4	3
P6	2	3	4	2	3



P7	3	2	5	3	3
P8	4	2	4	3	4
P9	4	4	3	4	4
P10	5	2	4	3	3

