

# Minnesota State University Moorhead

## FINC 560: Portfolio Analysis and Management

### A. COURSE DESCRIPTION

Credits: 3

Lecture Hours/Week: 45

Lab Hours/Week: 0

OJT Hours/Week: \*.\*

Prerequisites: None

Corequisites: None

MnTC Goals: None

This course involves analysis of techniques used in combining securities into portfolios. Students will examine various classes of securities and investments meeting a proper balance for investor needs.

### B. COURSE EFFECTIVE DATES: 08/20/2012 - Present

### C. OUTLINE OF MAJOR CONTENT AREAS

1. The Portfolio Management Process
2. Evaluating Portfolio Performance
3. Investment Policy Statement
4. Managing Individual Investor Portfolios
5. Managing Institutional Investor Portfolios
6. Asset Allocation
7. Equity Portfolio Management
8. Fixed-Income Portfolio Management
9. Portfolio Risk Management Techniques
10. Monitoring and Rebalancing

### D. LEARNING OUTCOMES (General)

1. Describe the portfolio management process.
2. Prepare an Investment Policy Statement.
3. Describe the process of managing individual investor portfolios.
4. Describe the process of managing institutional investor portfolios.
5. Determine an optimum asset allocation for a portfolio.
6. Evaluate equity portfolio management strategies.
7. Evaluate fixed-income portfolio management strategies.
8. Evaluate portfolio risk management techniques.
9. Describe techniques to monitor and rebalance a portfolio.
10. Evaluate performance of a portfolio.
11. Improve effective written communication skills.

### E. Minnesota Transfer Curriculum Goal Area(s) and Competencies

None

**F. LEARNER OUTCOMES ASSESSMENT**

As noted on course syllabus

**G. SPECIAL INFORMATION**

None noted