



Module Specification

Investment Management

Version: 2027-28, v3.0, Approved

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Part 1: Information

Module title: Investment Management

Module code: UMAD5X-15-3

Level: Level 6

For implementation from: 2027-28

UWE credit rating: 15

ECTS credit rating: 7.5

College: College of Business and Law

School: CBL Bristol Business School

Partner institutions: National Economics University Vietnam, The British College Nepal

Field: Accounting and Finance

Module type: Module

Pre-requisites: None

Excluded combinations: None

Co-requisites: None

Continuing professional development: No

Professional, statutory or regulatory body requirements: None

Part 2: Description

Overview: This module aims to equip students with the knowledge, technical ability and professional skills required to make informed investment decisions. The investment characteristics of the most common forms of financial assets will be explored as well as their collective behaviours within portfolios. Students will develop their critical thinking skills so that they are able to provide reliable recommendations on investment decisions.

Features: Not applicable

Educational aims: The main aim of the module is to equip students with the ability to analyse and recommend investments.

The module will also prepare students for the following professional skills:

Effective communication, use of IT to extract and manage data, plan and design a research, reflective skills.

Outline syllabus: The syllabus includes:

Risk and return

Diversification, Portfolio Theory

The Capital Asset Pricing Model

The Efficient Market Hypothesis

Equity valuation

Bond prices and yields

An introduction to derivatives: Options and Futures

Part 3: Teaching and learning methods

Teaching and learning methods: The module will be delivered following the 3Ps approach.

Prepare: Lectures will disseminate an introduction to the theory and provide relevant resources for students to undertake independent study. Students will also be expected to review slides and materials provided by the lecturer in advance.

Participate: Workshops will require students to actively engage, discuss ideas and undertake tasks under the guidance of the lecturer.

Practice: The students will undertake practical work set out in the lectures to

consolidate their knowledge and apply it to practical situations.

Sessions using financial databases will help contextualize the content of the module within the real world context and discuss investment actions in the lights of real world markets scenarios.

Module Learning outcomes: On successful completion of this module students will achieve the following learning outcomes.

MO1 Critically apply investment theories to financial markets and investment strategies.

MO2 Evaluate the investment characteristics of a variety of financial assets.

MO3 Recommend suitable investment actions that incorporate the current outlook in world markets.

Hours to be allocated: 150

Contact hours:

Independent study/self-guided study = 114 hours

Face-to-face learning = 36 hours

Reading list: The reading list for this module can be accessed at [readinglists.uwe.ac.uk](https://uwe.rl.talis.com/modules/umad5x-15-3.html) via the following link <https://uwe.rl.talis.com/modules/umad5x-15-3.html>

Part 4: Assessment

Assessment strategy: Report (2500 words) An individual assignment that tests students' ability to provide reliable well-reasoned investment advice.

Formative feedback will be provided to students throughout the module, verbally in every session by the lecturer, in the workshops by tutors, and peers. Additional support will be available via weekly office hours. In addition, an assessment brief session will be conducted to clarify and explain the expectations of the summative assessment.

Assessment tasks:

Report (First Sit)

Description: Individual report (2500 words)

Weighting: 100 %

Final assessment: Yes

Group work: No

Learning outcomes tested: MO1, MO2, MO3

Report (Resit)

Description: Individual report (2500 words)

Weighting: 100 %

Final assessment: Yes

Group work: No

Learning outcomes tested: MO1, MO2, MO3

Part 5: Contributes towards

This module contributes towards the following programmes of study:

Banking and Finance [NEU] - WITHDRAWN BSc (Hons) 2025-26

Accounting and Finance {Foundation} [Frenchay] BA (Hons) 2023-24

Banking and Finance {Foundation} [Frenchay] BSc (Hons) 2023-24

Business and Law {Foundation} [Frenchay] BA (Hons) 2023-24

Business and Management {Foundation} [Frenchay] BA (Hons) 2023-24

Accounting and Business Management {Foundation} [Frenchay] BA (Hons) 2023-24

Accounting and Business Management {Foundation} [Frenchay] - WITHDRAWN BA (Hons) 2024-25

Accounting and Business Management [Frenchay] BA (Hons) 2024-25

Banking and Finance {Foundation} [Frenchay] - WITHDRAWN BSc (Hons) 2024-25

Banking and Finance [Frenchay] BSc (Hons) 2024-25

Accounting and Finance [Frenchay] BA (Hons) 2024-25

Accounting and Finance {Foundation} [Frenchay] - WITHDRAWN BA (Hons) 2024-25

Business and Management [Frenchay] BA (Hons) 2024-25

Business and Management {Foundation} [Frenchay] - WITHDRAWN BA (Hons) 2024-25

Business and Law [Frenchay] - WITHDRAWN BA (Hons) 2024-25

Business and Law {Foundation} [Frenchay] - WITHDRAWN BA (Hons) 2024-25

Accounting and Finance {Foundation}[Frenchay] BA (Hons) 2024-25

Accounting and Business Management {Foundation} [Frenchay] BA (Hons) 2024-25

Accounting and Finance [Villa] BSc (Hons) 2025-26

Accounting and Finance [Phenikaa] BA (Hons) 2025-26

Accounting and Finance [BIBM] BSc (Hons) 2025-26

Accounting and Finance {Dual} [Taylors] BA (Hons) 2025-26

Accounting and Finance [Frenchay] BA (Hons) 2025-26

Accounting and Business Management [Frenchay] BA (Hons) 2025-26

Business and Management [NepalBrit] BBA (Hons) 2025-26

Accounting and Business Management [Frenchay] - WITHDRAWN BA (Hons) 2025-26

Accounting and Finance [Phenikaa] - WITHDRAWN BA (Hons) 2025-26

Banking and Finance [Frenchay] - WITHDRAWN BSc (Hons) 2025-26

Accounting and Finance [Frenchay] - WITHDRAWN BA (Hons) 2025-26

Business and Management [Phenikaa] - WITHDRAWN BA (Hons) 2025-26

Banking and Finance {Dual} [Taylors] BA (Hons) 2025-26

Business and Management [NepalBrit] BBA (Hons) 2025-26

Business and Management [Frenchay] BA (Hons) 2024-25

Business and Management [Frenchay] - WITHDRAWN BA (Hons) 2025-26

Accounting and Business Management {Foundation} [Frenchay] BA (Hons) 2024-25

Accounting and Finance [HELP] BA (Hons) 2025-26

Accounting and Finance [Frenchay] BA (Hons) 2025-26

Accounting and Finance [Frenchay] BA (Hons) 2024-25

Business and Management [NepalBrit] BBA (Hons) 2025-26

Banking and Finance {Top-Up} [Frenchay] BSc (Hons) 2027-28

Business and Management {Top Up}[Frenchay] BA (Hons) 2027-28

Business Management with Accounting and Finance {Top-Up} [Frenchay] BA (Hons) 2027-28

Business and Management {Top Up} [INTUNI] BA (Hons) 2027-28

Accounting and Finance {Foundation} [Frenchay] BA (Hons) 2023-24

Accounting and Business Management [Frenchay] BA (Hons) 2024-25

Accounting and Business Management {Foundation} [Frenchay] BA (Hons) 2023-24

Banking and Finance [Frenchay] BSc (Hons) 2024-25

Banking and Finance {Foundation} [Frenchay] BSc (Hons) 2023-24

Business and Management [Frenchay] BA (Hons) 2024-25

Business and Management {Foundation} [Frenchay] BA (Hons) 2023-24

Business and Management [Frenchay] BA (Hons) 2024-25

Business and Management {Foundation} [Frenchay] BA (Hons) 2023-24