Module Specification

Portfolio Management with Professional Practice

Version: 2027-28, v1.0, Approved

Contents

Part 1: Information

Module title: Portfolio Management with Professional Practice

Module code: UMETH6-30-3

Level: Level 6

For implementation from: 2027-28

UWE credit rating: 30

ECTS credit rating: 15

College: College of Business and Law

School: CBL Bristol Business School

Partner institutions: None

Field: Economics

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 focuses on techniques for constructing and evaluating investment portfolios. Students will learn how to curate portfolios, utilising modern portfolio theory and risk management strategies. Additionally, the course emphasises effective communication of technical investment information to non-specialists, preparing students to interact with potential investors. Through hands-on practice and real-world case studies, students develop practical skills in portfolio construction, analysis, and communication. This module equips students with the knowledge and expertise necessary for success in the dynamic field of investment management.

Features: Not applicable

Educational aims: Developing Analytical Skills: Enable students to comprehend and apply fundamental concepts and techniques in portfolio management, including asset allocation, diversification, and risk assessment, through theoretical understanding and practical exercises.
Fostering Practical Competence: Equip students with the ability to construct, optimise, and evaluate investment portfolios using real-world data and industry-standard software, honing their skills in portfolio construction and management.
Enhancing Communication Skills: Cultivate effective communication skills by teaching students how to convey complex technical information related to investment portfolios in a clear, concise, and accessible manner to diverse stakeholders, including non-specialist investors and clients.
Promoting Professionalism and Ethical Conduct: Underpin an understanding of professional standards and ethical considerations in portfolio management, guiding students to conduct themselves with integrity, responsibility, and adherence to regulatory requirements in their interactions with clients and financial markets.

Outline syllabus: An indicative syllabus for this module would be:

Ethics and professional standards:
Introduction to Code of ethics (CFA) and standards of professional conduct
Professionalism and Integrity in Capital Markets
Ethics in the investment profession: Duties to Clients, Duties to Employers, Investment Analysts Recommendations, Conflicts of interest
Global Investment Performance Standards (GIPS)

EMH, Portfolio Theory, Asset pricing models: the CAPM and Multifactor models, behavioural finance, ESG considerations and capital market expectations

Portfolio Management, Policy Statements, Types of Investment Funds: Hedge Funds, Private Equity, Venture Capital, Market Indexes, Passive and Active Strategies, Asset Allocation, Portfolio Construction, Execution of Portfolio Decisions, Economic Analysis, Fee Structures and the Effect of Regulations

Portfolio Performance Measurement.

Part 3: Teaching and learning methods

Teaching and learning methods: The teaching and learning strategy for the "Portfolio Management with Professional Development" module emphasizes workshop-based learning, hands-on practical tasks, and engagement with external guest speakers. Adopting a 3Ps strategy—Prepare, Participate, and Practice—students will first prepare through pre-readings and theoretical foundations. They'll then actively participate in workshops, applying concepts to real-world scenarios. Practical tasks, including portfolio construction exercises, reinforce learning. External guest speakers from the industry provide insights into professional practice. This approach fosters experiential learning, equipping students with both theoretical knowledge and practical skills essential for success in portfolio management and investment practice.

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

MO1 Construct and manage investment portfolios, considering the requirements of clients.

MO2 Provide evidence-based recommendations on portfolio management decisions.

MO3 Communicate and frame technical knowledge in ways that are appropriate for multiple audiences.

MO4 Critically evaluate their own professional performance.

Hours to be allocated: 300

Contact hours:

Independent study/self-guided study = 228 hours

Workshops = 72 hours

Reading list: The reading list for this module can be accessed at readinglists.uwe.ac.uk via the following link https://uwe.rl.talis.com/modules/umeth6-30-3.html

Part 4: Assessment

Assessment strategy: The assessment strategy for "Portfolio Management with Professional Development" centres on two tasks.

Task 1: A Portfolio Management Report (60%):
Students design an investment portfolio using real-world data.

Task 2: Portfolio (40%):
A five-minute briefing presentation for a client, a 500-word briefing note that complements the briefing and a reflective piece where the student undertakes a 360 review of their performance on this task.

Assessment tasks:

Portfolio (First Sit)
Description: 5 minute presentation with Q&A with a 500-word briefing note and a reflective review on the students' professional performance.
Weighting: 40 %
Final assessment: Yes
Group work: No
Learning outcomes tested: MO3, MO4

Report (First Sit)
Description: Report on a portfolio (2500 words).
Weighting: 60 %
Final assessment: No
Group work: No
Learning outcomes tested: MO1, MO2

Portfolio (Resit)
Description: 5 minute presentation with Q&A with a 500-word briefing note and a reflective review on the students' professional performance.
Weighting: 40 %
Final assessment: Yes
Group work: No
Learning outcomes tested: MO3, MO4

Report (Resit)
Description: Report on a portfolio (2500 words).
Weighting: 60 %
Final assessment: No
Group work: No
Learning outcomes tested: MO1, MO2

Part 5: Contributes towards

This module contributes towards the following programmes of study:

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

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

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

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

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