Module Descriptor

Title	Investment Analysis And Portfolio Management		
Session	2026/27	**Status**	
Code	LNDN11138	**SCQF Level**	11
Credit Points	20	**ECTS (European Credit Transfer Scheme)**	10
School	**Business and Creative Industries**		
Module Co-ordinator	M Hussien		

Summary of Module

This module provides students with the knowledge and analytical skills required to evaluate investment opportunities and manage portfolios in a dynamic global financial environment. It is designed to develop a deep understanding of investment principles, asset valuation techniques, and portfolio construction strategies used in professional investment practice.

The module covers key topics such as risk–return analysis, asset pricing models, portfolio diversification, performance measurement, and behavioural aspects of investment decision-making. It also explores fixed income and equity valuation, portfolio optimization using the Markowitz framework, and the application of the Capital Asset Pricing Model (CAPM) and multifactor models. In addition, the module introduces students to modern portfolio management tools and data analytics techniques for performance evaluation and risk management.

Through practical exercises and case studies, students will gain hands-on experience in designing and managing investment portfolios using real financial data and software applications. By the end of the module, students will be able to critically analyse investment alternatives, construct diversified portfolios that align with specific risk–return objectives, and apply evidence-based approaches to support sound investment and portfolio management decisions in both academic and professional contexts.

Module Delivery Method	**On-Campus[1]**	**Hybrid[2]**	**Online[3]**	**Work -Based Learning[4]**
	☒	☐	☐	☐

[1] Where contact hours are synchronous/ live and take place fully on campus. Campus-based learning is focused on providing an interactive learning experience supported by a range of digitally-enabled asynchronous learning opportunities including learning materials, resources, and opportunities provided via the virtual learning environment. On-campus contact hours will be clearly articulated to students.

[2] The module includes a combination of synchronous/ live on-campus and online learning events. These will be supported by a range of digitally-enabled asynchronous learning opportunities including learning materials, resources, and opportunities provided via the virtual learning environment. On-campus and online contact hours will be clearly articulated to students.

[3] Where all learning is solely delivered by web-based or internet-based technologies and the participants can engage in all learning activities through these means. All required contact hours will be clearly articulated to students.

[4] Learning activities where the main location for the learning experience is in the workplace. All required contact hours, whether online or on campus, will be clearly articulated to students

Campuses for Module Delivery	☐ Ayr ☐ Dumfries		☐ Lanarkshire ☒ London ☐ Paisley		☐ Online / Distance Learning ☐ Other (specify)	
Terms for Module Delivery	Term 1	☒	Term 2	☒	Term 3	☒
Long-thin Delivery over more than one Term	Term 1 – Term 2	☐	Term 2 – Term 3	☐	Term 3 – Term 1	☐

Learning Outcomes	
L1	Critically appraise advanced theories and empirical research in investment analysis, asset pricing, and portfolio management within global financial markets.
L2	Apply quantitative and analytical techniques to evaluate investment alternatives, value financial assets, and measure portfolio performance under varying market conditions.
L3	Design, construct, and optimise diversified investment portfolios using modern portfolio theory, risk management models, and contemporary portfolio optimisation tools.
L4	Interpret and evaluate complex financial data using modelling techniques to inform evidence-based investment and asset allocation decisions.
L5	Critically assess the influence of behavioural biases, ethical considerations, and macroeconomic factors on investment strategies and portfolio outcomes.

Employability Skills and Personal Development Planning (PDP) Skills	
SCQF Headings	**During completion of this module, there will be an opportunity to achieve core skills in:**
Knowledge and Understanding (K and U)	**SCQF 11** Students will develop the ability to analyse and value financial assets, construct and manage investment portfolios, and apply quantitative techniques to optimise risk–return outcomes. They will also gain practical skills in interpreting market data and making informed, evidence-based investment decisions.
Practice: Applied Knowledge and Understanding	**SCQF 11** Students will apply investment modelling techniques, using financial datasets and portfolio management stools, to analyse investment opportunities, interpret performance results, and support data-driven portfolio and asset allocation decisions.
Generic Cognitive skills	**SCQF 11** Students will develop analytical and critical thinking skills by evaluating investment data, interpreting portfolio performance, and drawing evidence-based conclusions to inform sound investment and asset management decisions.
Communication, ICT and Numeracy Skills	**SCQF 11** Students will enhance their ability to interpret and communicate investment insights effectively and to use portfolio modelling tools for analysing financial markets and investment performance.

Autonomy, Accountability and Working with Others	**SCQF 11** Students will develop independent problem-solving and decision-making skills, taking responsibility for their investment analyses while collaborating effectively in teams to address portfolio management and financial data challenges.

Prerequisites	**Module Code**	**Module Title**
	Other	
Co-requisites	**Module Code**	**Module Title**

Learning and Teaching	
In line with current learning and teaching principles, a 20-credit module includes 200 learning hours, normally including a minimum of 36 contact hours and maximum of 48 contact hours.	
Learning Activities During completion of this module, the learning activities undertaken to achieve the module learning outcomes are stated below:	**Student Learning Hours** (Note: Learning hours include both contact hours and hours spent on other learning activities)
Lecture / Core Content Delivery	15
Tutorial / Synchronous Support Activity	21
Independent Study	164
n/a	
n/a	
n/a	
TOTAL	200

Indicative Resources
The following materials form essential underpinning for the module content and ultimately for the learning outcomes: Bodie, Z., Kane, A., & Marcus, A. J. (2021). Investments (international student edition). Reilly, F. K., Brown, K. C., & Leeds, S. J. (2022). Investment Analysis and Portfolio Management. Cengage Learning. . Ang, A. (2014). Asset management: A systematic approach to factor investing. Oxford University Press.
(N.B. Although reading lists should include current publications, students are advised (particularly for material marked with an asterisk*) to wait until the start of session for confirmation of the most up-to-date material)

Attendance and Engagement Requirements
In line with the Student Attendance and Engagement Procedure, Students are academically engaged if they are regularly attending and participating in timetabled on-

campus and online teaching sessions, asynchronous online learning activities, course-related learning resources, and complete assessments and submit these on time. **For the purposes of this module, academic engagement equates to the following:** Attending all timetabled classes (online and on campus), engaging with the VLE, engaging with takeaway assignments/ case studies, and completing all the module assessments.

Equality and Diversity
The University's Equality, Diversity and Human Rights Procedure can be accessed at the following link: UWS Equality, Diversity and Human Rights Code. In line with current legislation (Equality Act, 2010) and the UWS Equality, Diversity, and Human Rights Code, our modules are accessible and inclusive, with reasonable adjustment for different needs where appropriate. Necessary adjustment can be made to serve the specific needs of students with special learning needs when brought to the attention of the school. For instance, the lesson materials could be provided in advance if needed.
(N.B. Every effort will be made by the University to accommodate any equality and diversity issues brought to the attention of the School)

Supplemental Information

Divisional Programme Board	**Accounting Finance Law**
Overall Assessment Results	☐ **Pass / Fail** ☒ **Graded**
Module Eligible for Compensation	☐ **Yes** ☒ **No** **If this module is eligible for compensation, there may be cases where compensation is not permitted due to programme accreditation requirements. Please check the associated programme specification for details.**
School Assessment Board	Accounting Finance and Law
Moderator	R Michael
External Examiner	G Elgin
Accreditation Details	NA
Module Appears in CPD catalogue	☐ **Yes** ☒ **No**
Changes / Version Number	1.0

Assessment (also refer to Assessment Outcomes Grids below)
Assessment 1
Class test
Assessment 2
Coursework
Assessment 3
(N.B. (i) Assessment Outcomes Grids for the module (one for each component) can be found below which clearly demonstrate how the learning outcomes of the module will be assessed.

(ii) An indicative schedule listing approximate times within the academic calendar when assessment is likely to feature will be provided within the Student Module Handbook.)

Component 1							
Assessment Type	**LO1**	**LO2**	**LO3**	**LO4**	**LO5**	**Weighting of Assessment Element (%)**	**Timetabled Contact Hours**
Class test	☒	☒	☒	☐	☐	50	

Component 2							
Assessment Type	**LO1**	**LO2**	**LO3**	**LO4**	**LO5**	**Weighting of Assessment Element (%)**	**Timetabled Contact Hours**
Coursework	☒	☒	☒	☒	☒	50	

Component 3							
Assessment Type	**LO1**	**LO2**	**LO3**	**LO4**	**LO5**	**Weighting of Assessment Element (%)**	**Timetabled Contact Hours**
	☐	☐	☐	☐	☐		
Combined total for all components						100%	hours

Change Control

What	**When**	**Who**