AMFM-2425-509-Portfolio management & Investments

Name of lecturer(s) & Email	Level/Semester, Status, Timing	ECTS*, CH & SDL**
Benoit DAENEN Benoit.daenen@solvay.edu	Level 1 Compulsory Between 18-11-24 and 08-01-25	3 24 66

Description of the course

This is a transversal course about investments and portfolio management discussing portfolio management & investments in risky assets across the value chain. The course will start with a short case study in order to "set the scene" from a practical starting point.

Discussion about portfolio management and investments will be realized from the prospect to the client point of view taking into account the regulation framework. Students will get the opportunity to fix and improve their knowledge regarding the main issues of portfolio management of liquid and illiquid assets. This will be reinforced by practitioners sharing their experience and passion with real up-to-date examples and a co-creation exercise re the conception of a portfolio management reporting of the future. The competences developed are :

- Technical skills
- Critical mindset re financial models assumptions
- Open mindset re new trends in portfolio management & investments
- Innovation skills re portfolio management reporting

Course units

Not provided by the faculty member. Please check Canvas.

Course Learning Outcomes (CLOs)

1. To build a portfolio in function of client's objectives and constraints
2. To manage a portfolio, take decisions in function of the chosen investment decision process (IDP)
3. To clarify and reinforce your basic knowledge re :
4. Fixed income valuation & management
5. Listed and unlisted equities valuation & management
6. To measure financial & impact performances
7. To imagine the portfolio management reporting 2.0
8. To integrate regulatory framework alongside this journey

Prerequisite (if any)

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Contribution to Programme Learning Objectives (PLOs)***	Evaluation scale
- Learning Objective 1.1: Introduction - Learning Objective 2.1: Reinforcement - Learning Objective 3.1: Reinforcement - Learning Objective 4.1.: Reinforcement - Learning Objective 5.1: Reinforcement	0-20

Main Teaching methods used in the course

Lecture, Directed Discussion, Direct Instruction, Case Based Learning, Problem-based learning

Contribution to the Environmental, social and governance (ESG)

Course Contribution to ESG: Yes
Contact Hours are dedicated to ESG: 18
Contact Hours containing climate solutions for how organisations can reach net zero: 6
Description of contribution: ESGs is discussed across all the journey

Notice: The information available in the course outline is subject to change. Please keep yourself informed at all times by regularly checking Canvas.

*ECTS - European Credit Transfer and Accumulation System (1 ECTS = 30 hours of learning)
**CH - Contact Hours in class or online, SDL - Self-Directed Learning including readings, homework, group work, preparation to assessment, etc
***PLO - Programme Learning Objectives are available on the curriculum page

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Assessment methodology / Learners Use of Time and Load

Assignment one: Individual exam
- weight 90%
- workload estimated = 80 hours
- due 07-01-25
- <u>Guidelines</u>: You're expected to answer basic questions on topics discussed during the course. You will get the opportunity to evaluate yourselve with quizz

Assignment two: Case study
- weight 10%
- workload estimated = 10 hours
- due 17-11-24
- <u>Guidelines</u>: In a group of three, you will need to solve one case study in a period of three hours. Participants should dialogue and learn from each other. Open books. Students will vote for the best case study

Readings

Required
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Recommended
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Other Learning Materials
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