

# Minnesota State University Moorhead

## FINC 460: Portfolio Analysis and Management

### A. COURSE DESCRIPTION

Credits: 3

Lecture Hours/Week: 3

Lab Hours/Week: 0

OJT Hours/Week: \*.\*

Prerequisites:

This course requires the following prerequisite

FINC 360 - Principles of Investment

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:** 06/01/1995 - Present

### C. OUTLINE OF MAJOR CONTENT AREAS

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

### 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