

Brief Course Outline

Course Title: Investment Management

Course Number and Section

MOS

3316B 550

Instructor Name(s): Javier Martinez Hernandez

Instructor Email(s): fmarti23@uwo.ca

Disclaimer: Information in the brief course outline is subject to change. The syllabus posted on OWL Brightspace is the official and authoritative source of information for the course.

Course Description:

This course examines the major theories of investment finance and the pricing bonds, stocks and options. Portfolio construction using passive and active management strategies will also be discussed. The course will appeal to anyone considering a career as a financial analyst, portfolio manager or in wealth management. It will also aid in preparing for the preliminary exams of various professional designations. The first part of the course will cover the main tenets of mean variance portfolio theory to determine efficient portfolios and select the optimum portfolio.

The second part of the course will examine standard equilibrium pricing models such as the CAPM and the APT.

Subsequently, the pricing of debt and equity instruments in their respective markets will be covered. The course will conclude with an introduction to option pricing and other derivatives.

Although much attention will be paid to the theoretical constructs of the material, throughout the course, the emphasis will be placed on applications.

Learning Outcomes: one outcome per entry

Evaluate the appropriate use of various portfolio construction techniques.

Gain a fundamental understanding of the difference between investment and speculation.

Get exposure to the technical skills needed to be a financial analyst.

Textbooks and Course Materials:

(Required) Bodie Z., A. Kane, A.J. Marcus, S. Perrakis and P. Ryan, Investments, 11th Canadian edition McGraw Hill Ryerson (CAD \$163.15)

<https://bookstore.uwo.ca/product/9781265657338>

(Alternative) Ebook Rental (CAD \$69) <https://bookstore.uwo.ca/product/cebebookid9925009>

Methods of Evaluation: one assignment per entry

Assignment	Due Date mm/dd/yy	Weight - %
First Term Test		30

Assignment	Due Date mm/dd/yy	Weight - %
Second Term Test		30
Group Project		20
Class Participation		5
Bloomberg Certificate		5
Assignments		10

In solidarity with the Anishinaabe, Haudenosaunee, Lūnaapéewak, and Chonnonton peoples on whose traditional treaty and unceded territories this course is shared.

Friday, December 12, 2025

Huron Brief Course Outline

For Textbooks and Course Materials (below), you are required to include the cost of each textbook or other learning material.

Note whether there are any restrictions that would prevent a student from using a second-hand copy. Here is some suggested text:

- Required textbook: [author, title, edition, publisher, date]. Cost: [insert amount].
 - Or include the weblink of the textbook's publisher site that includes the cost information.
- Students need to purchase this edition. Second-hand or older editions will not be sufficient.
- OR Students are welcome to purchase second-hand or earlier editions of this textbook.
- This course has an optional field trip that costs [insert amount].
- This course has a required field component that costs [insert amount].