

**PROGRAM LEVEL: BACHELOR DEGREE**

**MAJOR: FINANCE AND BANKING**

**SPECIALIZE: SECURITIES**

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**COURSE SYLLABUS**

**1. Course :** *PORTFOLIO MANAGEMENT*

**2. Course number:**

**3. Number of credit:** 02 credits

**4. Student level:** Fourth – year student

**5. Time allocation:**

+ Attendance 70%

+ Self – study 30%

**6. Prerequisites:** The students should already have principal knowledge of monetary and finance theory, corporate finance, stock market, investment or equivalent

**7. Objectives of the course:** The course is designed to equip students both conceptual and practical knowledge on managing portfolios. The specific objectives are as follows:

(1). To understand a background of portfolio management theories

(2). To understand a structure of securities market

(3). To understand both conceptual and practical knowledge on managing fixed income portfolios

(4). To understand both conceptual and practical knowledge on managing equity portfolios

(5). To classify and apply techniques on evaluation portfolio

**8. Course description:** The course provides background knowledge on how to manage portfolios, how they are structured and how to evaluate them in the market. A further insight on techniques used in securities analysis and investment are introduced.

**9. Responsibility of students:**

- Participation in class
- Participation in group discussion and presentation.
- Completion of questions and exercises in class and at home.
- Reading required textbook and supplemental readings.

**10. Textbooks:**

- Required textbook:

(1) Yen, BK and Thuy, TTT (2009), Securities analysis and investment, translated, Statistical Publishing House, Vietnam.

(2) Frank K. Reilly and Keith C. Brown (2011), Investment analysis and portfolio management, South-Western College Pub.

- Supplemental textbooks

(1) Kien, Dao, Lecturer's slides

**11. Assessment:**

- Discussions and presentation: 20%
- Mix-term test: 10%
- Final test: 70%

**12. Grade:** Based on the credit based program/

**13. Course contents:**

No of hours	Details	Textbooks / Chapters	Preparation of students	Achieved objectives
Day 1 (4 hrs)	<b>CHAPTER 1: An introduction of portfolio theories</b>	Textbooks Lecturer's notes	Reading textbooks /required chapters	(1), (2)
Day 2, 3 (8 hrs)	<b>CHAPTER 2: An introduction of portfolio management</b>	Textbooks Lecturer's notes	Reading textbooks /required chapters	(1), (2)
Day 4 and 5 (8 hrs)	<b>CHAPTER 3: An introduction of fixed income portfolio management</b>	Textbooks Lecturer's notes	Reading textbooks /required chapters	(3)
Day 6, 7 (8 hrs)	<b>CHAPTER 4: An introduction of equity portfolio management</b>	Textbooks Lecturer's notes	Reading textbooks /required chapters	(4)
Day 8 (4hrs)	<b>CHAPTER 5: Portfolio evaluation</b>	Textbooks Lecturer's notes	Reading textbooks /required chapters	(5)
<b>Total: 30 hrs</b>				

Approved by the Faculty/Department

Prepared by: Dao Trung Kien