AFCP8145
Advanced Investment Management
Term 2, Infrequent attendance, City 2021
Department of Applied Finance

Contents

General Information 2
Learning Outcomes 2
General Assessment Information 3
Assessment Tasks 3
Delivery and Resources 5
Unit Schedule 5
Policies and Procedures 5

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Notice
As part of Phase 3 of our return to campus plan, most units will now run tutorials, seminars and other small group activities on campus, and most will keep an online version available to those students unable to return or those who choose to continue their studies online.

To check the availability of face-to-face activities for your unit, please go to timetable viewer. To check detailed information on unit assessments visit your unit’s iLearn space or consult your unit convenor.
### General Information

<table>
<thead>
<tr>
<th>Unit convenor and teaching staff</th>
<th>Dan Daugaard</th>
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</thead>
<tbody>
<tr>
<td></td>
<td><a href="mailto:dan.daugaard@mq.edu.au">dan.daugaard@mq.edu.au</a></td>
</tr>
<tr>
<td>Contact via Email</td>
<td>Aaron Minney</td>
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<td></td>
<td><a href="mailto:aaron.minney@mq.edu.au">aaron.minney@mq.edu.au</a></td>
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<tr>
<td>Credit points</td>
<td>10</td>
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<tr>
<td>Prerequisites</td>
<td>Admission to Master of Applied Finance or Graduate Diploma of Applied Finance</td>
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<td>Corequisites</td>
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<td>Co-badged status</td>
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#### Unit description

This unit connects the "Why" to the "How" of investment Management. It applies strategies and techniques employed by successful investment managers for investing to match the required outcomes for these investments, particularly in the accumulation and retirement phases of the superannuation and retirement industry.

### Important Academic Dates

Information about important academic dates including deadlines for withdrawing from units are available at [https://students.mq.edu.au/important-dates](https://students.mq.edu.au/important-dates).

### Learning Outcomes

On successful completion of this unit, you will be able to:

- **ULO1**: Explain the tools and techniques used by industry participants to construct investment portfolios to meet long term objectives.
- **ULO2**: Critically evaluate investment management strategies and solutions and their impact on objectives over time.
- **ULO3**: Develop and defend recommended investment management strategy solution(s) and judgement(s).
General Assessment Information

Late submissions and extensions

Tasks 10% or less – No extensions will be granted. Students who have not submitted the task prior to the deadline will be awarded a mark of 0 for the task, except for cases in which an application for special consideration is made and approved.

Tasks above 10% - No extensions will be granted. There will be a deduction of 10% of the total available marks made from the total awarded mark for each 24 hour period or part thereof that the submission is late (for example, 25 hours late in submission – 20% penalty). This penalty does not apply for cases in which an application for special consideration is made and approved. No submission will be accepted after solutions have been posted.

Assessment Tasks

<table>
<thead>
<tr>
<th>Name</th>
<th>Weighting</th>
<th>Hurdle</th>
<th>Due</th>
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<tbody>
<tr>
<td>Investment Management Case Study</td>
<td>35%</td>
<td>No</td>
<td>Refer to iLearn</td>
</tr>
<tr>
<td>Lifecycle advice assignment</td>
<td>35%</td>
<td>No</td>
<td>Refer to iLearn</td>
</tr>
<tr>
<td>Final assessment</td>
<td>30%</td>
<td>No</td>
<td>Refer to iLearn</td>
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Investment Management Case Study

Assessment Type 1: Case study/analysis
Indicative Time on Task 2: 30 hours
Due: Refer to iLearn
Weighting: 35%

A case study report of up to 2,000 words including both quantitative and qualitative analysis.

On successful completion you will be able to:

- Explain the tools and techniques used by industry participants to construct investment portfolios to meet long term objectives.
- Critically evaluate investment management strategies and solutions and their impact on objectives over time.
- Develop and defend recommended investment management strategy solution(s) and judgement(s).
Lifecycle advice assignment

Assessment Type 1: Quantitative analysis task
Indicative Time on Task 2: 20 hours
Due: Refer to iLearn
Weighting: 35%

Prepare and submit a report based on analysis of the data submitted using the lifecycle framework

On successful completion you will be able to:

• Explain the tools and techniques used by industry participants to construct investment portfolios to meet long term objectives.
• Critically evaluate investment management strategies and solutions and their impact on objectives over time.
• Develop and defend recommended investment management strategy solution(s) and judgement(s).

Final assessment

Assessment Type 1: Practice-based task
Indicative Time on Task 2: 20 hours
Due: Refer to iLearn
Weighting: 30%

A time-constrained task based on scenarios. Open book.

On successful completion you will be able to:

• Explain the tools and techniques used by industry participants to construct investment portfolios to meet long term objectives.
• Critically evaluate investment management strategies and solutions and their impact on objectives over time.
• Develop and defend recommended investment management strategy solution(s) and judgement(s).

If you need help with your assignment, please contact:

• the academic teaching staff in your unit for guidance in understanding or completing this
type of assessment

- the Learning Skills Unit for academic skills support.

2 Indicative time-on-task is an estimate of the time required for completion of the assessment task and is subject to individual variation.

Delivery and Resources

Refer to iLearn

Unit Schedule

Refer to iLearn

Policies and Procedures

Macquarie University policies and procedures are accessible from Policy Central (https://staff.mq.edu.au/work/strategy-planning-and-governance/university-policies-and-procedures/policy-central). Students should be aware of the following policies in particular with regard to Learning and Teaching:

- Academic Appeals Policy
- Academic Integrity Policy
- Academic Progression Policy
- Assessment Policy
- Fitness to Practice Procedure
- Grade Appeal Policy
- Complaint Management Procedure for Students and Members of the Public
- Special Consideration Policy (Note: The Special Consideration Policy is effective from 4 December 2017 and replaces the Disruption to Studies Policy.)

Students seeking more policy resources can visit the Student Policy Gateway (https://students.mq.edu.au/support/study/student-policy-gateway). It is your one-stop-shop for the key policies you need to know about throughout your undergraduate student journey.

If you would like to see all the policies relevant to Learning and Teaching visit Policy Central (https://staff.mq.edu.au/work/strategy-planning-and-governance/university-policies-and-procedures/policy-central).

Student Code of Conduct

Macquarie University students have a responsibility to be familiar with the Student Code of Conduct: https://students.mq.edu.au/admin/other-resources/student-conduct

Results

Results published on platform other than eStudent, (eg. iLearn, Coursera etc.) or released directly by your Unit Convenor, are not confirmed as they are subject to final approval by the
University. Once approved, final results will be sent to your student email address and will be made available in eStudent. For more information visit ask.mq.edu.au or if you are a Global MBA student contact globalmba.support@mq.edu.au

Student Support
Macquarie University provides a range of support services for students. For details, visit http://students.mq.edu.au/support/

Learning Skills
Learning Skills (mq.edu.au/learningskills) provides academic writing resources and study strategies to help you improve your marks and take control of your study.

- Getting help with your assignment
- Workshops
- StudyWise
- Academic Integrity Module

The Library provides online and face to face support to help you find and use relevant information resources.

- Subject and Research Guides
- Ask a Librarian

Student Enquiry Service
For all student enquiries, visit Student Connect at ask.mq.edu.au

If you are a Global MBA student contact globalmba.support@mq.edu.au

Equity Support
Students with a disability are encouraged to contact the Disability Service who can provide appropriate help with any issues that arise during their studies.

IT Help
For help with University computer systems and technology, visit http://www.mq.edu.au/about_us/offices_and_units/information_technology/help/.

When using the University’s IT, you must adhere to the Acceptable Use of IT Resources Policy. The policy applies to all who connect to the MQ network including students.