



AFCP8145

Advanced Investment Management

Term 2, In person-scheduled-infrequent, City 2022

Department of Applied Finance

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General Information

Unit convenor and teaching staff

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Credit points

10

Prerequisites

Admission to Master of Applied Finance or Graduate Diploma of Applied Finance

Corequisites

Co-badged status

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://www.mq.edu.au/study/calendar-of-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 of assessments

Unless a Special Consideration request has been submitted and approved, no extensions will be granted. There will be a deduction of 10% of the total available assessment-task marks made from the total awarded mark for each 24-hour period or part thereof that the submission is late. Late submissions will only be accepted up to 96 hours after the due date and time.

No late submissions will be accepted for timed assessments – e.g., quizzes, online tests.

Table 1: Penalty calculation based on submission time

Submission time after the due date (including weekends)	Penalty (% of available assessment task mark)	Example: for a non-timed assessment task marked out of 30
< 24 hours	10%	10% x 30 marks = 3-mark deduction
24-48 hours	20%	20% x 30 marks = 6-mark deduction
48-72 hours	30%	30% x 30 marks = 9-mark deduction
72-96 hours	40%	40% x 30 marks = 12-mark deduction
> 96 hours	100%	Assignment won't be accepted

Special Consideration

To request an extension on the due date/time for a timed or non-timed assessment task, you must submit a [Special Consideration application](#). An application for Special Consideration does not guarantee approval.

The approved extension date for a student becomes the new due date for that student. The late submission penalties above then apply as of the new due date.

Assessment Tasks

Name	Weighting	Hurdle	Due
<u>Investment Management Case Study</u>	35%	No	Refer to iLearn
<u>Lifecycle advice assignment</u>	35%	No	Refer to iLearn
<u>Final assessment</u>	30%	No	Refer to iLearn

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).

¹ 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 [Writing Centre](#) 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://policies.mq.edu.au) (<https://policies.mq.edu.au>). 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](#)
- [Assessment Procedure](#)
- [Complaints Resolution Procedure for Students and Members of the Public](#)
- [Special Consideration Policy](#)

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

To find other policies relating to Teaching and Learning, visit [Policy Central](https://policies.mq.edu.au) (<https://policies.mq.edu.au>) and use the [search tool](#).

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

Academic Integrity

At Macquarie, we believe [academic integrity](#) – honesty, respect, trust, responsibility, fairness and courage – is at the core of learning, teaching and research. We recognise that meeting the expectations required to complete your assessments can be challenging. So, we offer you a range of resources and services to help you reach your potential, including free [online writing and maths support](#), [academic skills development](#) and [wellbeing consultations](#).

Student Support

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

The Writing Centre

[The Writing Centre](#) provides resources to develop your English language proficiency, academic writing, and communication skills.

- [Workshops](#)
- [Chat with a WriteWISE peer writing leader](#)
- [Access StudyWISE](#)

- [Upload an assignment to Studiosity](#)
- [Complete the 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 Services and Support

Macquarie University offers a range of [Student Support Services](#) including:

- [IT Support](#)
- [Accessibility and disability support](#) with study
- Mental health [support](#)
- [Safety support](#) to respond to bullying, harassment, sexual harassment and sexual assault
- [Social support including information about finances, tenancy and legal issues](#)

Student Enquiries

Got a question? Ask us via [AskMQ](#), or contact [Service Connect](#).

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.