



Future Academy
Higher Future Institute for Specialized Technological Studies

Course Specification

1- Course information:

Course Code:	317
Course Title:	Principles of Investment
Year/level	3rd level- 1st semester
Academic Programs	Bachelor of Business administration (English)
Contact hours/ week	5hrs/w

2- Course aims:

After this course the student will be able to know a comprehensive understanding of the stock market, particularly the Egyptian Exchange (EGX). It delves into the complexities of investment and speculation strategies, enabling students to make informed decisions in various market roles. The course explores the complex interplay of market participants, including individual and institutional investors, financial institutions, government agencies, and regulatory bodies. It provides a solid foundation in fundamental and technical analysis, crucial for evaluating stocks and bonds. Additionally, the course covers portfolio management, risk management techniques, and the application of financial engineering tools like derivatives (options, futures, and swaps) to optimize investment strategies and mitigate risks

3- Intended learning outcomes of the course (ILOs):

a- Knowledge and understanding:

On successful completion of this course, the student should be able to:

- a1- deep understanding of the Egyptian Exchange (EGX) and its role in the Egyptian economy.
- a2 - Learn knowledge of investment in securities, organization and functioning of securities markets
- a3- Discuss the asset allocation and portfolio management
- a4- Compare between fundamental and technical analysis
- a5- Acquire basic knowledge of derivatives

b- Intellectual skills:

On completing this course, the student should be able to:

- b1- Analyze financial statements and assess the financial health of companies.
- b2- Apply the Capital Asset Pricing Model (CAPM) to estimate the expected return and risk of investments.
- b3- Interpret the impact of economic and market factors on investment decisions.
- b4- Evaluate investment opportunities using various valuation techniques.
- b5- Use information from multiple sources to make informed investment decisions.

c- Professional and practical skills:

At the end of this course, the student will be able to:

- c1- Use financial software and tools to analyze investment data.
- c2- Utilize informed decisions about buying and selling securities.
- c3- Implement investment portfolios that align with specific financial goals.
- c4- Classify the performance of investment portfolios.
- c5- Manage investment risk through diversification and hedging strategies.

d- General and transferable skills:

On successful completion of this course, the student should be able to:

- d1- Enhance their research and analytical skills to gather and interpret relevant information financial data.
- d2- Demonstrate Strong problem-solving and critical thinking skills to analyze complex financial issues.
- d3- Develop lifelong learning mindset, staying updated on market trends and industry developments.
- d4- Develop Effective communication skills to discuss investment concepts and strategies.
- d5- They will develop strong time management and organizational skills to manage multiple tasks and deadlines

4- Course contents

Topics/units	Number of hours		ILO's
	Lecture hours	Practical hours	
Module 1: Introduction to the Stock Market 1. Understanding the Stock Market: Definition, history, and basic concepts. 2. The Egyptian Exchange (EGX): Overview, structure, and trading mechanisms. 3. Types of Securities: Stocks, bonds, and derivatives.	6hrs	4hrs	a1,b5,c1,c5,d1,d2,d3,d4,d5
Module 2: Market Participants and Regulations 4. Market Participants: Investors, brokers, dealers, market makers, and regulators. 5. Regulatory Framework: The role of the Egyptian Financial Supervisory Authority (EFSA) and other regulatory bodies	6hrs	4hrs	a2,b5,c2,c5,d1,d2,d3,d4,d5
Module 3: Fundamental Analysis 7. Financial Statement Analysis: Income statement, balance sheet, and cash flow statement. 8. Ratio Analysis: Liquidity, solvency, profitability, and market value ratios. 9. Economic Analysis: Macroeconomic factors affecting the stock market.	6hrs	4hrs	a1,a2,a4,b1,b2,b3,b4,b5,c1,c2,c5,d1,d2,d3,d4,d5

Module 4: Technical Analysis 11. Charting Techniques: Candlestick charts, line charts, and bar charts. 12. Technical Indicators: Moving averages, relative strength index (RSI), and Bollinger Bands. 13. Chart Patterns: Head and shoulders, double top/bottom, and triangles.	6hrs	4hrs	a4,b4,c1,c2,c5,d1,d2,d3,d4,d5
Module 5: Portfolio Management 14. Portfolio Construction: Diversification, asset allocation, and rebalancing. 15. Risk Management: Identifying, measuring, and mitigating risks. 16. Performance Evaluation: Benchmarking and performance metrics	6hrs	4hrs	a3,b1,b2,b3,b4,c1,c2,c3,c4,c5,d1,d2,d3,d4,d5
Module 6: Derivatives and Financial Engineering 17. Options: Call and put options, option strategies, and option pricing models. 18. Futures: Futures contracts, margin requirements, and hedging strategies. 19. Swaps: Interest rate swaps and currency swaps.	6hrs	4hrs	a5,b4,c1,c2,c5,d1,d2,d3,d4,d5

5- Teaching and learning methods

Methods	ILO's																			
	a1	a2	a3	a4	a5	b1	b2	b3	b4	b5	c1	c2	c3	c4	c5	d1	d2	d3	d4	d5
Lectures	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√
Brainstorming					√					√								√		
Practical sections	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√
Self-learning				√													√			
Case study			√					√	√			√		√						
Assays and reviews	√	√	√	√	√	√	√	√	√	√	√	√	√	√	√			√		
Discussion groups								√							√	√				
Problem-solving																				
E-learning						√				√										
Blended learning																				

6- Teaching and learning methods for Low-achieving students

- Extra teaching hours for those who need help
- More quizzes to assess their ability for understanding the course
- Encourage the team work for those students with other advanced ones to increase their participation and understanding

7- Student assessment

Assessment method	Date	Grade weight (%)	ILOs
Written Examination	15 th week	50	a1-a5,b1-b5
Mid-Term Examination	7 th week	20	a1,a2,a3,b1,b2,b3
Quiz 1 & Quiz 2	4 th week & 11 th week	20	a1-a5,b1-b5
Other Assignments/Classwork:	Every week	10	a1-a5,b1-b5,c1-c5,d1-d5
Total:		100 %	

8-List of references

8.1. Student notebooks:

Lectures notes & sections notes

8.2. Essential textbooks:

... Frank K. Relly/Brown, Investment Analysis and Portfolio Management, 8th edition.

8.3. Recommended textbooks:

...Jordon, Miller ,Dolvin, fundamental of investments : valuation and Management.(2024)10th edition, Mc Graw Hill.

8.4. Journals, Periodical and Reportsetc.

8.5. Websites

..... The Egyptian Exchange (EGX)

Course Coordinator: Dr. Aya Assem

Head of department: Associate professor Dr. Mohamed Elbaz

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