Course Descriptions None 2026-2027

Course Title	Investment Analysis and Portfolio Management
Course Code	EBC2054
ECTS Credits	6,5
Assessment	Whole/Half Grades

Period

Period	Start	End	Mon	Tue	Wed	Thu	Fri
1	31-8-2026	16-10-2026		X			X

Level	Intermediate
Coordinator	Marlene Koch For more information:marlene.koch@maastrichtuniversity.nl
Language of instruction	English
Goals	Learn to manage portfolio of financial assets. Apply to real life cases.
Description	The purpose of this course is to study how investors (both retail and institutional) construct and manage portfolios. We follow the investment process investors follow in real life. That is from Asset Liability Management to Strategic and Tactical Asset Allocation to Portfolio Management, Security Selection and finally Trading. Each week we study a different asset class. Next to traditional assets like listed stocks we look at the added value of real estate, mutual funds, hedge funds and private equity in order to build diversified portfolios. Finally the course will introduce you to a new development in professional asset management; Socially Responsible Investing (SRI). We study the impact of SRI on portfolio return and risk. All topics are explored via real life cases using actual data.
Literature	Bodie Z., A. Kane and A. Marcus, Essentials of Investments, McGraw-Hill + selected articles. We always use the latest International Student Edition of BKM.
Prerequisites	* Knowledge and understanding of: portfolio theory (CAPM), basics of derivatives (options futures, forward) and basics of statistics (OLS regression). * Exchange students need to have taken at least one introductory finance course. * An advanced level of English.
Transitional Regulations	<ul class="trcohorts"> - Bachelor Economics and Business Economics - Economics and Management of Information [2024-2025 or earlier] - Bachelor Economics and Business Economics - International Business Economics - Major Finance [2024-2025 or earlier] - Bachelor Economics and Business Economics - International Business Economics - Major Information Management [2024-2025 or earlier] - Bachelor Economics and Business Economics - International Business Economics - Major Macroeconomics [2024-2025 or earlier] - Bachelor Economics and Business Economics - International Business Economics - Major Microeconomics [2024-2025 or earlier] - From 2025-2026 onwards, education and exam/resit opportunities are offered. Alternative options may be available. See the Bachelor EER 2025-2026 Appendix I Article 16 for more information. <table><col style="width: 200px;"><col style="width: 120px;"><col style="width: 120px;"><col><thead><tr><th>Academic Year</th><th>Education</th><th>Exam/Resit</th><th>Replacement(s)</th></tr></thead><tbody><tr><td>2025-2026 onwards</td><td>X</td><td>X</td><td>See the Bachelor EER 2025-2026 Appendix I Article 16 for more information</td></tr></tbody></table> <ul class="trcohorts"> - Bachelor International Business - Major Accounting [2024-2025 or earlier] - Bachelor International Business - Major Information Management [2024-2025 or earlier] - Bachelor International Business - Major Marketing [2024-2025 or earlier] - Bachelor International Business - Major Organisation [2024-2025 or earlier] - Bachelor International Business - Major Strategy [2024-2025 or earlier] - Bachelor International Business - Major Supply Chain Management [2024-2025 or earlier] - From 2025-2026 onwards, education and exam/resit opportunities are offered. Alternative options may be available. See the Bachelor EER 2025-2026 Appendix I Article 18 for more information. <table><col style="width: 200px;"><col style="width: 120px;"><col style="width: 120px;"><col><thead><tr><th>Academic Year</th><th>Education</th><th>Exam/Resit</th><th>Replacement(s)</th></tr></thead><tbody><tr><td>2025-2026 onwards</td><td>X</td><td>X</td><td>See the Bachelor EER 2025-2026 Appendix I Article 18 for more information</td></tr></tbody></table>
Teaching methods	Presentation / Lecture / Assignment / Groupwork
Assessment methods	Attendance / Written Exam / Assignment
Evaluation in previous academic year	For the complete evaluation of this course please click http://iwio-sbe.maastrichtuniversity.nl/rapporten.asp?referrer=codeUM

This course belongs to the following programme / specialisation

Bachelor Economics and Business Economics - Economics	Year 3 Business Electives
Bachelor Economics and Business Economics - Emerging Markets	Year 3 Elective Courses
Bachelor Economics and Business Economics - Economics and Management of Information	In transition - Year 2+3 Elective Courses
Bachelor Economics and Business Economics - Economics and Management of Information	Year 3 Free Elective
Bachelor Economics and Business Economics - International Business Economics	In transition - Maj Finance - Core Courses
Bachelor Economics and Business Economics - International Business Economics	In transition - Maj Inf Mgmt - Business Elec
Bachelor Economics and Business Economics - International Business Economics	In transition - Maj Macro - Business Elec
Bachelor Economics and Business Economics - International Business Economics	In transition - Maj Micro - Business Elec
Bachelor Economics and Business Economics - International Business Economics	Year 3 Business Elective
Bachelor Econometrics and Operations Research	Year 3 Elective Courses
Bachelor International Business - Emerging Markets	Year 3 Elective Courses
Bachelor International Business	In transition - Maj Accounting - Business Elec
Bachelor International Business	In transition - Maj Inf Mgmt - Business Elec
Bachelor International Business	In transition - Maj Marketing - Business Elec
Bachelor International Business	In transition - Maj Org - Business Elec
Bachelor International Business	In transition - Maj SCM - Business Elec
Bachelor International Business	In transition - Maj Strategy - Business Elec
Bachelor International Business	Year 3 Core Courses - Maj Finance
SBE Exchange Bachelor	Bachelor Exchange Courses
SBE Exchange Master	Bachelor Exchange Courses
SBE Non Degree Courses	Bachelor Courses
Pre-master International Business specialisation Marketing-Finance	Compulsory Courses
Pre-master International Business specialisation Strategic Corporate Finance	Compulsory Courses
Pre-master International Business specialisation Sustainable Finance	Compulsory Courses