

FIN354 Impact Investing and Green Finance

Level: 3

Credit Units: 5 Credit Units

Language: ENGLISH

Presentation Pattern: EVERY JAN

Synopsis:

FIN354 Impact Investing and Green Finance introduces the process of portfolio management with an emphasis on impact investing and green finance. Increasingly, asset managers are focusing on impact investing, which refers to creating environmental, social, and governance impact through their investment decisions. In FIN354 Impact Investing and Green Finance, students will learn how to craft an investment policy statement for the socially responsible client. They will also learn how socially responsible investing can be integrated into the portfolio construction process, including investments in instruments such as green and social impact bonds. Finally, methods to measure and manage risk, especially of stranded assets, and to evaluate the performance of an impact portfolio will be discussed.

Topics:

- Portfolio management process
- Investment policy statement and mandates
- Asset classes
- Portfolio theory
- Portfolio risk and return estimation
- Portfolio optimisation
- Investment performance measurement and reporting
- Investment risk mitigation
- Types and roles of ESG investing
- Green and social impact bonds
- ESG rating systems
- Methods to incorporate and evaluate ESG investing strategies

Textbooks:

Investments 13th Zvi Bodie, Alex Kane, Alan J, Marcus McGraw-Hill
ISBN-13: 9781266505966

FIN354 Study Guide (UDC - SUSS)
ISBN-13: SG-1803

Learning Outcome:

- Prepare an investment policy statement for clients
- Compute portfolio risk and return estimates
- Appraise and appreciate the role of asset allocation in portfolio management
- Compare the role of investing decisions using portfolio concepts
- Distinguish between different types of ESG investments
- Analyse and evaluate an impact portfolio's risk, performance and trade-offs
- Propose suitable portfolio for an investor, integrating sustainability factors
- Construct an optimised portfolio using spreadsheet software

Assessment Strategies - Regular Semester (Daytime Class):

Components	Description	Weightage Allocation (%)
Overall Continuous Assessment	TUTOR-MARKED ASSIGNMENT 1	10
	GROUP BASED ASSIGNMENT 1	25
	PARTICIPATION 1	15
Overall Examinable Components	Written Exam	50
Total		100

*The information listed is subject to review and change.