



UNIVERSITATEA „ALEXANDRU IOAN CUZA” din IAȘI

FACULTATEA de ECONOMIE ȘI ADMINISTRAREA AFACERILOR

TUTORIAL COURSE FORM

2025-2026 ACADEMIC YEAR

Name of the tutorial course (incoming Erasmus/exchange students)	Portfolio Management
Name of the professor	Assoc. prof. dr. Constantin-Marius APOSTOAIE
Email of the professor	marius.apostoaie@uaic.ro
Office of the professor	C804b, building C
Consultation days/hours	Weekdays (upon prior scheduling)
Semester(s) in which the tutorial course is available	1 st or 2 nd sem.
No. of ECTS credits	6
Level of study (bachelor/master/PhD)	bachelor/master
Short description/Contents	<p>The main objective of this course is to provide the foundations of modern methods used in portfolio management (of financial assets). Upon graduation from this discipline, the student will be able to differentiate the main methods and instruments used in portfolio management and will be familiar with the advantages and disadvantages of each of these methods.</p> <p>On completion of the course, students will be able to:</p> <ul style="list-style-type: none">• know the theoretical building blocks of portfolio management• know the main asset classes with their advantages and disadvantages• know the optimization techniques in the selection of asset classes and in the construction of portfolios• identify the appropriate financial instruments to meet the requirements of investors• know the necessary measures to ensure the protection of the portfolio against risk• differentiate investment styles• evaluate the performance of the portfolios.
Assessment/Evaluation	<ol style="list-style-type: none">1. Individual case study: <i>virtual financial portfolio simulation</i> - 50%2. Individual essay: <i>stock market outlook</i> - 35%3. Four individual Q&A Sessions - Quality of arguments - 15%
Bibliography	<p>Main references:</p> <ol style="list-style-type: none">1. Elton, E. (coord) – Modern Portfolio Theory and Investment Analysis, 7th ed., 20062. Swensen, D. F - Pioneering Portfolio Management: An Unconventional Approach to Institutional Investment, 2nd Ed, Free Press, London, 2009
Observations	Not applicable