

Investment Analysis

1. MODULE SUMMARY

Aims and Summary

This course is design to provide participants with basic knowledge of the investment analysis, valuation of securities , industry and company analysis, analysis of alternative investments and to translate what the students have learned in the class room to actual participation in the financial markets based on real case presentation.

Module Size and credits

ECTS points	5
Total student study hours	125
Number of weeks	12
School responsible	Lazarski University, Faculty of Economics and Management
Academic Year	2021/2022

Entry Requirements (pre-requisites and co-requisites)

Accounting

Excluded Combinations n/a

Composition of module mark (including weighting of components)

Final exam, 60%

Coursework, 40%, composed of a project accompanied by a presentation

Pass requirements

To pass the course a student must score at least 40% of the overall weighted average and not less than 35% for each assessment component (i.e. coursework and final exam). Reassessment: coursework component and/or examination as appropriate. **Special Features** n/a

Course stages for which this module is mandatory

BA in Business Economics, Year 3

Course stages for which this module is a core option n/a

2. TEACHING, LEARNING AND ASSESSMENT

Intended Module Learning Outcomes

Upon completion of the module students should be able to:

1. analyze market tendencies and risk management
2. analyze methods of portfolio management
3. explain the risk connected to global investment
4. interpret the behaviour of particular securities, such as stocks and bonds
5. apply value strategy to selected investment portfolio.

Indicative Content

1. The Investment Setting
2. The Concept of Investment
3. Organization and Functioning of Securities Market
4. Measure of Return and Risk
5. Source of Information on Investments
6. Efficient Capital Markets
7. An Introduction to Portfolio Management
8. Markowitz Portfolio Management
9. Bonds Fundamentals and Bond Valuation
10. Industry Analysis
11. Technical and Fundamental Analysis

Teaching and Learning

This module will be taught by means of discussion classes, lectures and problem solving.

Student activity and time spent on each activity comprises

Guided	0 hours	(0%)
Lecture	0 hours	(0%)
Seminar	60 hours	(48%)

Self-guided 65 hours (53%)

Total 125hours

Method of Assessment (normally assessed as follows)

Final exam, 60%, will assess learning outcomes 1-5

Coursework, 40%, composed of a project: a report accompanied by a presentation, will assess learning outcomes 1, 2, 5

Re-sit

Students failing any component of assessment, at the first attempt, are entitled to one re-sit attempt. This will be by new examination and/or new coursework scheduled for the next assessment opportunity. For coursework, if more than one element existed in the first attempt, this may be combined into one assessment for re-sit.

3. MODULE RESOURCES

Essential Reading

Reilly, F K, Brown C K, (2011) Investment Analysis and Portfolio Management; Cengage Learning, Inc; 10th edition

Recommended Reading:

Hirt G A, Block S B (2006) Fundamentals of Investment Management, McGraw-Hill/Irwin.

The Wall Street Journal, Financial Times.

Required Equipment

None

4. MODULE ORGANISATION

Module leader

Name Mgr. Yulian Skoropadyk

E-mail yulian.skoropadyk@gmail.com

Length and month of examination

120 minutes in February

Expected teaching timetable slots

Timetable information should be verified with the School responsible for the module

No timetable information available

Date of last amendment

15.02.2017

Subject Quality and Approval information

Board of Study	Faculty Collaborative Provision Committee
Subject Assessment Board	Faculty Council, Faculty of Economics and Management

Shortened title

Date of approval by FCPC	13 Feb 2017
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