

<b>The title of the course</b>	<b>Investment analysis</b>
<b>Faculty</b>	Faculty of Management and Transport
<b>The level of studies</b>	first
<b>Semester</b>	winter/summer
<b>The form of classes and number of hours</b>	15 h
<b>Classes conducted for Polish students. Erasmus students can join them</b>	
<b>Language of instruction</b>	English
<b>The number of ECTS</b>	3
<b>Teacher</b>	Dominika Dusza (PhD in economics)
<b>The aims of the course (maximum 500 characters)</b>	The goal of the course is to describe the investment process from a point of view of an individual investor. To choose the right investment opportunity one needs to know what the choice is, how to determine its value and how to evaluate its future performance. During the course you will get to know tools and techniques which will allow you to build a good performing investment portfolio in the future.
<b>The content of the course: main topics and key ideas</b>	<ol style="list-style-type: none"> <li>1. Asset classes and their characteristics – classical and alternative investment opportunities</li> <li>2. Risk free assets and the risk free rate</li> <li>3. Financial assets – returns, risk factors and value drivers</li> <li>4. Investing in alternative assets</li> <li>5. Investment analysis approach – bottom up and top down analysis</li> <li>6. The role of benchmark and investors profile</li> <li>7. The usage of technical and fundamental analysis to find a financial opportunity</li> <li>8. Types of investment strategies – growth or value; contrarian or momentum; long or short term.</li> <li>9. Automated and high frequency trading</li> </ol>
<b>Didactics methods</b>	Individual consulting Class discussion
<b>Course requirements</b>	Individual literature studies Pre-class preparation Preparing and presenting final project (paperwork)

<p><b>Literature (basic and supplementary)</b></p>	<p><b>Basic:</b></p> <ol style="list-style-type: none"> <li>1. Blake D.: Financial market analysis, Wiley &amp; Sons, 2000, 2nd Revised edition</li> <li>2. Damodaran A.: Damodaran on Valuation, New York: John Wiley &amp; Sons, 1994</li> <li>3. Gospodarowicz M, Ślęzak E.: Corporate financial analysis Warszawa : Warsaw School of Economics, 2015.</li> </ol> <p><b>Supplementary:</b></p> <ol style="list-style-type: none"> <li>1. Banks E., The Simple Rules of Risk, John Wiley &amp; Sons, 2002</li> <li>2. Brigham, E. F.: Fundamentals of financial management. Chicago, Dryden Press ,1989</li> <li>3. Qoqiauri L., Qoqiauri N.: Financial markets : monograph, Bielsko-Biała : University ; Ruda Śląska : Drukarnia i Studio Graficzne Omnidium, 2019</li> </ol>
<p><b>The effects of the education</b></p> <ul style="list-style-type: none"> <li>- <b>knowledge</b></li> <li>- <b>skills</b></li> <li>- <b>social competences</b></li> </ul>	<p>Knowledge:</p> <ol style="list-style-type: none"> <li>1. Student knows different classes of assets and their investment characteristics</li> <li>2. Student has a basic knowledge on technical analysis</li> <li>3. Student knows the role of macro and micro - fundamental analysis</li> </ol> <p>Skills:</p> <ol style="list-style-type: none"> <li>1. Student can use micro and macro - economic financial information to identify an investment opportunity</li> <li>2. Student is able to evaluate investment opportunity using technical analysis</li> <li>3. Student can conduct simple fundamental analysis</li> <li>4. Student is able to apply chosen investment strategy</li> </ol> <p>Social competences:</p> <ol style="list-style-type: none"> <li>1. Student has an understanding of the life long learning concept, can compete and broaden knowledge, rise personal and professional skills as well as competencies</li> </ol>

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