

Basic information about the subject (independent of the cycle)

Module name	Investment Finance
Erasmus code	PL LUBLIN01
ISCED code	0412
Language of instruction	English
Website	http://www.umcs.pl/pl/courses-in-english,1984.htm
Prerequisites	General knowledge of finance, financial mathematics, MS Excel. Basic issues of corporate finance and financial markets will be extra advantage.
ECTS points hour equivalents	Contact hours (work with an academic teacher): 30 Total number of hours with an academic teacher: 40 Number of ECTS points with an academic teacher: 3 Non-contact hours (students' own work): 40 Total number of non-contact hours: 40 Number of ECTS points for non-contact hours: 3 Total number of ECTS points for the module: 6
Educational outcomes verification methods	Assessment of activity during contact hours Assessment of short real life case studies and exercises Assessment of investment advice report
Description	Lecture with workshop providing practical knowledge of financial market, financial instrument and elements of financial advisory, provided by practitioner with over 10 year experience in financial advising for firms (including international transactions), enterprise valuation and financial risk management and over 20 year experience in teaching. Workshop will develop skills in investment instruments analysis, heuristic and detailed methods of company valuation and providing investment advice.
Reading list	<ul style="list-style-type: none"> • Patterson R., Kicia M. (2016). <i>Capital where it is wanted. Practitioner's guide to financial management</i>, UMCS Press • Other books on financial market and corporate finance available • Data and articles provided by lecturer or on-line available.
Educational outcomes	KNOWLEDGE A student will: <ul style="list-style-type: none"> • know how financial markets operate and how to use financial instruments in investment issues • know what underlays company value • know methods of financial risk assessment and management SKILLS A student will be able to: <ul style="list-style-type: none"> • assess potential profit and risk from financial instrument • value a company • build up and manage portfolio of financial instruments ATTITUDES A student will be: <ul style="list-style-type: none"> • ready to active participation in groups, organizations and institutions that provide economic activities. • able to act as rational decision-maker.
Practice	n/a

Information about classes in the cycle

Website	http://www.umcs.pl/pl/courses-in-english,1984.htm
Educational outcomes verification methods	Assessment of short real life case studies and exercises Assessment of investment advice report Assessment of in-class activity during discussions, case studies, examples solved
Comments	
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A list of topics	<ol style="list-style-type: none"> 1. Revision of financial mathematics 2. Financial market. Overview of financial instruments 3. Risk free rate and bond investing 4. Government, municipal and corporate bonds 5. Bond risk and debt ratings 6. Shares 7. Valuation of shares: DCF and multiples 8. Investment report 9. Portfolio of shares and bonds 10. Portfolio management 11. Portfolio risk and risk management 12. Futures and options 13. Derivatives in financial risk management 14. Derivatives in portfolio management
Teaching methods	lecture, case study, discussion, exercises
Assessment methods	<p>40% - Participation and in-class activity</p> <p>30% - Case study and exercises (projects)</p> <p>30% - Investment advice report</p>