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| **Prowadzący** | Mariusz Kicia |
| **Oferta PJO\*** | TAK |
| **Oferta PJOE\*** | TAK |
| **Kierunek, rok, stopień dla PJO (\*obowiązkowe)** | I stopień + Erasmus |
| **Semestr roku 2022/2023** | letni |

\* PJO – przedmiot w języku obcym dla studentów polskich / PJOE – przedmiot w języku obcym dla studentów Erasmus+
\*\* zostawić właściwe

BASIC INFORMATION ABOUT THE SUBJECT (INDEPENDENT OF THE CYCLE)

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| --- | --- |
| **Module name** | Investment Finance |
| **Erasmus code** | PL LUBLIN01 |
| **ISCED code** | 0412 |
| **Language of instruction** | English |
| **Website** | [https://www.umcs.pl/en/courses-in-english-2021-2022,21582.htm](https://www.umcs.pl/en/courses-in-english-2021-2022%2C21582.htm) (dla PJOE) |
| **Prerequisites** | General knowledge of finance, financial mathematics, MS Excel. Basic issues of corporate finance and financial markets will be an extra advantage. |
| **ECTS points hour equivalents** | Contact hours (work with an academic teacher): 15Total number of hours with an academic teacher: 20Number of ECTS points with an academic teacher: 1,5Non-contact hours (students' own work): 20Total number of non-contact hours: 20Number of ECTS points for non-contact hours: 1,5Total number of ECTS points for the module: 3 |
| **Educational outcomes verification methods** | In-class activityShort real life case studies and exercises Investment advice report |
| **Description** | Lecture with workshop providing practical knowledge on financial market, financial instruments and selected issues of financial advisory, provided by practitioner with over 10 year experience in financial consultancy for firms (including international transactions), business valuation and financial risk management and over 20-year experience in teaching. Workshop will develop skills in investment instruments analysis, methods of business valuation and investment advisory. |
| **Reading list** | 1. Patterson R., Kicia M. (2016). Capital where it is wanted. Practitioner’s guide to financial management, UMCS Press
2. Other books on financial market and corporate finance available
3. Data and articles provided by lecturer or on-line available.
 |
| **Educational outcomes** | KNOWLEDGEA student will know:* how financial markets operate and how to use financial instruments in investment issues
* what underlays company value
* methods of financial risk assessment and management

SKILLSA student will be able to:* assess potential profit and risk from investment
* estimate rational range of company value
* build up and manage portfolio of financial instruments

ATTITUDESA student will be:* ready to active participation in groups, organizations and institutions
* able to act as a rational decision-maker
 |
| **Practice** | n/a |

INFORMATION ABOUT CLASSES IN THE CYCLE

|  |  |
| --- | --- |
| **Website** | [https://www.umcs.pl/en/courses-in-english,21103.htm](https://www.umcs.pl/en/courses-in-english%2C21103.htm) (dla PJOE) |
| **Educational outcomes verification methods** | Short real life case studies and exercises Valuation reportIn-class activity during discussions, case studies |
| **Comments** |  |
| **Reading list** | * Patterson R., Kicia M. (2016). Capital where it is wanted. Practitioner’s guide to financial management, UMCS Press
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| **A list of topics** | 1. Revision of financial mathematics
2. Financial market
3. Bonds and other risk free investments
4. Investing in equities & equity valuation
5. Optimizing portfolio
6. Derivatives: futures and options
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| **Teaching methods** | lecture, case study, discussion, exercises |
| **Assessment methods** | 40% - Participation and in-class activity 30% - Case study and exercises 30% - Investment report (final project) |