**SYLLABUS**

**regarding the qualification cycle FROM 2023TO2024**

1. Basic Course/Module Information

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| --- | --- |
| Course/Module title | Financial markets and Investment Strategy  |
| Course/Module code \* |  |
| Faculty (name of the unit offering the field of study) | College of Social Sciences |
| Name of the unit running the course | *Institute of Economics and Finance*  |
| Field of study | Economics  |
| Qualification level  |  |
| Profile | General academic |
| Study mode | Full-time |
| Year and semester of studies |   |
| Course type | Elective specialized contents group  |
| Language of instruction | Tomasz Potocki, PhD, DSc |
| Coordinator | Tomasz Potocki, PhD, DSc |
| Course instructor | English |

\* - as agreed at the faculty

1.1.Learning format – number of hours and ECTS credits

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Semester(n0.) | Lectures | Classes | Colloquia | Lab classes | Seminars | Practical classes | Internships | others | **ECTS credits**  |
|  | 30 |  |  |  |  |  |  |  | 5 |

1.2. Course delivery methods

- conducted in a traditional way

- involving distance education methods and techniques

1.3. Course/Module assessment (exam, pass with a grade, pass without a grade)

Exam

2. Prerequisites

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| Basic Statistics, Econometrics, Macroeconomics |

3. Objectives, Learning Outcomes, Course Content, and Instructional Methods

3.1. Course/Module objectives

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| --- | --- |
| C1 | 1. Develop the knowledge about the main financial markets and basics in investment strategy  |
| C2 | 2. Acquire the skills to build investment strategy on different financial markets |
| C3 | 3. Apply the knowledge of financial markets |
| C4 | 4. Have a clearer understanding of financial markets and basic investment strategies |

3.2. Course/Module Learning Outcomes (to be completed by the coordinator)

|  |  |  |
| --- | --- | --- |
| Learning Outcome | The description of the learning outcome defined for the course/module | Relation to the degree programme outcomes |
| EK\_01 | Define basic concepts in the field of financial markets and investment strategy | K\_W01 |
| EK\_02 | Explain relationships and differences between different financial market, investment strategies  | K\_W02 |
| EK\_03 | Choose appropriate methods for the analysis and presentation of financial strategy methods | K\_W08 |
| EK\_04 | Obtain and analyse data concerning financial markets and investment strategies | K\_U03 |
| EK\_05 | Apply financial knowledge in the search for optimum solutions to financial strategy | K\_U08 |
| EK\_06 | Have the skill to prepare written papers in English on selected course issues | K\_U10 |
| EK\_07 | Able to work in groups taking on varied roles and accepting co-responsibility for the accomplishment of tasks | K\_K01 |
| EK\_08 | Manifest disposition for independent learning process and work organization | K\_K03 |

**3.3. Course content (to be completed by the coordinator)**

1. Lectures

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| Content outline  |
| 1. Efficiency market hypothesis v. behavioral finance – key investment methods (pros and cons) key terms, q&a session, discussion |
| 2. Stock markets introduction key terms, q&a session, discussion, quantitive problems |
| 3. Bond markets introduction key terms, q&a session, discussion, quantitive problems |
| 4. Money markets introduction key terms, q&a session, discussion, quantitive problems |
| 5. Mortgage markets introduction key terms, q&a session, discussion, quantitive problems |
| 6. Currency markets introduction key terms, q&a session, discussion, quantitive problems |
| 7. The future of finance (derivatives) – key trends and challenges key terms, q&a session, discussion |

3.4. Methods of Instruction

Lectures with multimedia presentations. Discussion. Group working. Case study.

4. Assessment techniques and criteria

The credit and final grade awarded at the end of the course is based on the following criteria:

1. Attendance and in-class participation (30%), Final exam (70%)

4.1 Methods of evaluating learning outcomes

|  |  |  |
| --- | --- | --- |
| Learning outcome | Methods of assessment of learning outcomes (e.g. test, oral exam, written exam, project, report, observation during classes) | Learning format (lectures, classes,…) |
| EK\_01 | Observation during classes (Discussion), written examination | **Classes** |
| EK\_02 | Observation during classes (Discussion), written examination | **Classes** |
| EK\_03 | Observation during classes (Discussion), written examination | **Classes** |
| EK\_04 | Observation during classes (Discussion), written examination | **Classes** |
| EK\_05 | Observation during classes (Discussion), written examination | **Classes** |
| EK\_06 | Observation during classes (Discussion), written examination | **Classes** |
| EK\_07 | Observation during classes (Discussion), written examination | **Classes** |
| EK\_08 | Observation during classes (Discussion), written examination | **Classes** |

4.2 Course assessment criteria

|  |
| --- |
|  Attendance and in-class participation (30%), Final exam (70%)  |

5. Total student workload needed to achieve the intended learning outcomes

– number of hours and ECTS credits

|  |  |
| --- | --- |
| Activity | Number of hours |
| Scheduled course contact hours | 30 |
| Other contact hours involving the teacher (consultation hours, examinations) | 20 |
| Non-contact hours - student's own work (preparation for classes or examinations, projects, etc.) | 50 |
| Total number of hours | 100 |
| Total number of ECTS credits | 4 |

\* One ECTS point corresponds to 25-30 hours of total student workload

6. Internships related to the course/module

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| --- | --- |
| Number of hours | *n/a* |
| Internship regulations and procedures | *n/a* |

7. Instructional materials

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| Compulsory literature:1. F. Mishkin, S. Eakins, Financial Markets add Institutions International Edition 6th Edition, Pearson Education, 2008.
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| Complementary literature: 1. M. Cahill, *Financial Times Guide to Making the Right Investment Decisions, How to Analyse Companies and Value Shares 2nd Edition*, Pearson Education 2010.
2. F.S. Mishkin, *Economics of Money, Banking and Financial Markets,* Pearson Education 2009.
3. J. Hull, *Options, Futures, and Other Derivatives with Derivagem CD*, United States Edition 7th Edition, Pearson Education 2008.
4. G. Arnold, *The definitive companion to investment and the financial markets 2nd Edition*, Pearson Education 2009.
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Approved by the Head of the Department or an authorised person