**SYLLABUS**

**regarding the qualification cycle FROM 2024TO2025**

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)

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%) –Classes

2. Prerequisites

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| Basic Statistics, Econometrics, Macroeconomics |

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

3.1. Course/Module objectives

|  |  |
| --- | --- |
| 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

4.1 Methods of evaluating learning outcomes

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| --- | --- | --- |
| 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