

## ITEM CARD (SYLLABUS)

### Description of the course

Code course		Course name	FUNDAMENTALS OF INVESTMENTS		
IBF/O/I/S/B2.43a			PODSTAWY INWESTOWANIA		
Language		English			
Academic Year		2024/2025			
Direction of study		International Business and Finance			
Level of education (study)		Level 1			
Profile of education (study)		General academic			
Form of study		Stationary			
Semester / semesters		V			
Belonging to a course groups		B2-Elective courses specific to the field of study			
Course status		Elective			
Form of classes, hours, ECTS points		Form of classes	Number of hours	Number of ECTS points	
		Lecture	10 [h]	3 ECTS	
		Exercises	30 [h]		
		Seminar	[h]		
Relationship of subject	with profile of education (study)	Related to conducted scientific activity in the field of economics and finance			2 ECTS
	with qualifications	-----			ECTS
	with discipline	Economics and finance			3 ECTS
Form of teaching		traditional - classes organized at the University			
The criterion for the selection of students		All students of International Business and Finance			
Unit running course		Department of Economic Policy and Banking			
Coordinator		Dr Joanna Bukowska, prof. URad.			
Faculty www address		http://weif.uniwersytetradom.pl			
E-mail, phone number of coordinator		j.bukowska@uthrad.pl (48) 361-74-98			

### COURSE OUTCOMES, METHODS OF TEACHING AND VERIFICATION OF THE EFFECTS OF EDUCATION

Purpose of the course:	The main goal of the course is to provide knowledge about the basics of investing, including methods of analysis and valuation of financial instruments, investment strategies, investment planning, investment portfolio construction, and risk
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	management.
Course teaching content:	<p><i>The course content is related to conducted scientific research.</i></p> <p><i>Lecture content:</i></p> <ol style="list-style-type: none"> <li><b>1. The essence of investing (2h, W1,W2)</b> <ul style="list-style-type: none"> <li>- investment planning</li> <li>- rate of return and risk</li> <li>- diversification and asset allocation</li> <li>- wallet design</li> </ul> </li> <li><b>2. Characteristics of the financial market and its mechanisms (2h, BN, W1, W2)</b> <ul style="list-style-type: none"> <li>- definition of financial markets</li> <li>- functions of the financial market in the economy</li> <li>- financial market participants</li> <li>- financial market classification</li> </ul> </li> <li><b>3. Investing in financial market instruments (3h, BN, W1,W2)</b> <ul style="list-style-type: none"> <li>- concept and classification of financial instruments</li> <li>- money market instruments</li> <li>- capital market instruments</li> <li>- futures market instruments</li> <li>- currency market instruments</li> </ul> </li> <li><b>4. Financial market analyzes (2h, W1,W2)</b> <ul style="list-style-type: none"> <li>- fundamental analysis</li> <li>- technical analysis</li> <li>- behavioral analysis</li> </ul> </li> <li><b>5. Written test (1h)</b></li> </ol> <p><i>Exercises content:</i></p> <ol style="list-style-type: none"> <li><b>1. Time value of money (2h, U1,U2,K1,K2)</b></li> <li><b>2. The essence and measures of risk (2h, U1, U2, K1, K2)</b> <ul style="list-style-type: none"> <li>- concepts and sources of risk</li> <li>- risk measurement</li> <li>- risk reduction through diversification</li> </ul> </li> <li><b>3. Mechanisms of investing in financial market instruments (14h, U1, U2, K1, K2)</b> <ul style="list-style-type: none"> <li>- valuation of money market instruments</li> <li>- valuation of capital market instruments</li> <li>- valuation of futures market instruments</li> <li>- valuation of currency market instruments</li> </ul> </li> <li><b>4. Technical analysis (2h, U1,U2,K1,K2)</b></li> <li><b>5. Fundamental analysis (4h, U1,U2, K1, K2)</b></li> <li><b>6. Behavioral analysis (2h, U1, U2, K1, K2)</b></li> <li><b>7. Financial planning and investing in the context of an efficient market (3h, U1, U2, K1, K2)</b> <ul style="list-style-type: none"> <li>- investment planning, portfolio construction and risk management</li> <li>- investment opportunities and their impact on the choice of financial instruments and risk</li> <li>- the importance of efficient markets</li> </ul> </li> <li><b>8. Written test (1h)</b></li> </ol>
Method of teaching:	<i>instructional methods (lecture including multimedia techniques with elements of discussion); practical methods (demonstration, analytical exercises)</i>
Grading criteria, criteria for assessing learning outcomes, method of calculating the final grade:	<p><i>The condition for passing the course is achieving all the required learning outcomes specified for the course.</i></p> <p><i>Lecture – evaluation based on a written test.</i></p> <p><i>Exercises - The final grade is determined by the following: written</i></p>

	test and activity during course
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Education effects for the course in relation to the direction effects and form of classes				Verification methods of learning outcomes (form check)	
Number of education effect	Description effects of education for the subject (PEU) Student who has completed the course (W) knows and understands/(U) is able to /(K) is ready to:	Directional learning effect (KEU)	Form of realization of teaching	Examination form	Form check
W1	The student has knowledge about the functioning of financial markets and the financial instruments listed on them.	K_W04	Lecture	Pass with a grade	Written test
W2	The student has theoretical knowledge about financial instruments traded on the stock exchange and the techniques and methods of their analysis and valuation. Moreover, he knows techniques and tools for obtaining, processing and analyzing data in this area.	K_W05	Lecture	Pass with a grade	Written test
U1	Student is able to obtain the right information and data necessary in the process of making investment decisions.	K_U05	Exercises	Pass with a grade	Written test
U2	Student can enter into stock market transactions by analyzing and valuating financial instruments and identifying phenomena occurring in the economic environment.	K_U04	Exercises	Pass with a grade	Written test
K1	Student is aware of the dynamic changes on the financial markets and the need to continue the process of learning and deepening knowledge.	K_K01	Exercises	Pass with a grade	Discussion/ activity during course
K2	Is ready to think and act in an entrepreneurial way.	K_K04	Exercises	Pass with a grade	Discussion/ activity during course

Recommended reading, literature supplement, teaching aids
<ol style="list-style-type: none"> <li>1. Mayo H.B., <i>Investments: An Introduction</i>, 13th Edition, Cengage Learning, 2020</li> <li>2. Bodie Z., Kane A., Marcus A., <i>Investments</i>, Mc Graw-Hill Education, USA 2014</li> <li>3. Bukowska J.E., <i>The degree of integration of the Bulgarian and Croatian equity markets into the eurozone share equity market</i>, <i>European Research Studies Journal</i>, 2021, Volume XXIV, Special Issue 4;</li> <li>4. Bukowska J.E., <i>The degree of integration of the Bulgarian and Croatian government bond markets into the eurozone government bond market</i>, <i>European Research Studies Journal</i>, 2021, Volume XXIV, Special Issue 4;</li> </ol> <p>A detailed list of additional literature, web sources and teaching aids will be provided by a teacher during the first class</p>

Student workload needed to achieve the assumed learning outcomes - balance of ECTS points			
Participation in classes, activities	Student's working hours [h]		
	Other hours. Contact (IGK)	Classes without a teacher – student's own work (ZBN)	Classes
Participation in Lectures/ Seminars	X	X	10 [h]
Participation in Exercises/Laboratories	X	X	30 [h]

Participation in the Consultation	5 [h]	X	X
Preparing to lectures/ exercises/seminars Preparation for an examination	X	30[h]	X
Summary of student's workload	5 [h]/ 0,2 ECTS	30 [h]/ 1,2 ECTS	40 [h]/ 1,6 ECTS
Points of ECTS for subject	75 [h] / 3 ECTS		

Additional information and remarks
<p>For students with special needs, including those with disabilities and chronic illnesses, the methods and forms of verifying learning outcomes specified above (in the course syllabus) are appropriately adjusted to meet the individual needs of these students.</p> <p>"The detailed rules and rights of students with special needs, including those with disabilities and chronic illnesses, regarding participation, assessment, and examinations, are specified in the Study Regulations, Study Rules, and Procedures for Ensuring Accessibility of the Educational Process for Students with Special Needs, including those with disabilities and chronic illnesses."</p>