

Subject card

Subject name and code	Investment Management, PG_00155716						
Field of study	Management						
Date of commencement of studies	October 2024		Academic year of realisation of subject		2024/2025		
Education level	Bachelor's studies		Subject group		Obligatory subject group in the field of study Subject group related to scientific research in the field of study		
Mode of study	part-time studies		Mode of delivery		at the university		
Year of study	1		Language of instruction		Polish		
Semester of study	2		ECTS credits		6.0		
Learning profile	academic		Assessment form		exam		
Conducting unit	Department of Investment and Real Estate -> Faculty of Management -> Rector						
Name and surname of lecturer (lecturers)	Subject supervisor		dr hab. Dariusz Trojanowski				
	Teachers		mgr Rafał Kramer				
			dr Michał Komorowski				
			mgr Piotr Płachta				
			dr Ewelina Nawrocka				
Lesson types	Lesson type	Lecture	Tutorial	Laboratory	Project	Seminar	SUM
	Number of study hours	20.0	20.0	0.0	0.0	0.0	40
	E-learning hours included: 0.0						
Learning activity and number of study hours	Learning activity	Participation in didactic classes included in study plan		Participation in consultation hours		Self-study	SUM
	Number of study hours	40		36.0		74.0	150
Subject objectives	Understanding the process of managing tangible and financial investments, including elements of risk assessment.						

Learning outcomes	Course outcome	Subject outcome	Method of verification
	[ZARZL3_U04] The student is able to use the acquired knowledge of management science and quality in professional practice.	The student can apply the acquired knowledge of investment management in professional practice.	[SU1] oral statement/conversation/discussion
	[ZARZL3_U01] The student is able to correctly interpret socio-economic phenomena, current events in economic policy, economics, as well as to independently formulate his own opinions in this regard and to propose adequate solutions in case of changes occurring in these areas.	The student can correctly interpret socio-economic phenomena and current events in economic policy, as well as consider their impact on investment management.	[SU1] oral statement/conversation/discussion [SU4] test/exam - oral or written [SU5] implementation of a problem task
	[ZARZL3_W13] The student knows advanced methods and techniques of managerial analysis to support the process of economic decision-making, and is familiar with sources of data and information from various fields of social sciences, especially management and quality sciences.	The student knows selected methods and techniques of analyses that support the investment decision-making process, as well as the sources of data and information necessary for the analysis.	[SW1] oral statement/conversation/discussion
	[ZARZL3_K07] The student is aware of the need to adapt his behavior and conduct to their role in the team.	The student is aware of adjusting their behavior and approach according to the role they play in a team.	[SK1] oral statement/conversation/discussion
	[ZARZL3_W01] The student has advanced knowledge in the social sciences, with particular emphasis on the discipline of management and quality sciences, and understands their interrelationships with other social sciences.	The student has knowledge in the field of social sciences, with particular emphasis on investment management, and understands its relationship with other social sciences.	[SW4] test/exam - oral or written [SW1] oral statement/conversation/discussion [SW5] implementation of a problem task
	[ZARZL3_K05] The student is ready to correctly evaluate phenomena and clearly justify his position through rational, logical and entrepreneurial use of knowledge - basing his assertions and decisions on the analysis of received information.	The student is ready to make appropriate evaluations of phenomena and clearly justify their position through a rational, logical, and entrepreneurial use of knowledge—grounding their assertions and decisions on the analysis of the received information about investment parameters.	[SK1] oral statement/conversation/discussion
Subject contents	I. Basic Investment Issues 1. Concept, characteristics, classification of investments, principles of investment management 2. Definition, characteristics, and types of tangible investments 3. Definition, characteristics, and types of financial investments 4. Investments in intangible assets II. Investment Profitability 1. Rationalization of investment decisions: criteria, time, risk, methods of assessing profitability 2. Time value of money 3. Investment financing, cost of capital, discount rate in investing 4. Tools for financial assessment of tangible investments 5. Valuation of financial instruments 6. Investing in intangible assets III. Selected Trends in Investing 1. Personal investments, passive investing 2. Alternative investments 3. Sustainable investments, social responsibility of investments 4. Innovations as a type of investment 5. Introduction to real estate investing, flipping		
Prerequisites and co-requisites			
Assessment methods and criteria	Subject passing criteria	Passing threshold	Percentage of the final grade
	test	51.0%	50.0%
	colloquium	51.0%	50.0%

Recommended reading	Basic literature	- Nawrocka E., Szczepaniak K., Welzant K., Wojewnik-Filipkowska A.: Inwestycje przedsiębiorstw w niepewnych warunkach rynkowych, CEDEWU, Warszawa 2022; rozdziały: 1, 2 oraz 5. - Jajuga K., Jajuga T.: Inwestycje, instrumenty finansowe, aktywa niefinansowe, ryzyko finansowe, inżynieria finansowa, PWN, Warszawa 2017; rozdziały 1, 3, 4, 5, 9 oraz 10. - Marcinek K.: Wprowadzenie do inwestowania. Wydawnictwo Uniwersytetu Ekonomicznego w Katowicach Katowice, 2014; rozdziały: 1, 2, 3 oraz 5.
	Supplementary literature	- Czekala M.: Analiza fundamentalna i techniczna. Wydawnictwo Akademii Ekonomicznej, Wrocław 1997. - Dębski W.: Rynek finansowy i jego mechanizmy, PWN, Warszawa 2010. - Dębski W., Teoretyczne i praktyczne aspekty zarządzania finansami przedsiębiorstwa, PWN, Warszawa 2005. - Dziworska K., Decyzje inwestycyjne przedsiębiorstw, Wyd. UG, Gdańsk 2000. - Reuters: Analiza techniczna: wprowadzenie. Dom Wydawniczy ABC, Oficyna Ekonomiczna, 2001.
	eResources addresses	
Example issues/ example questions/ tasks being completed		
Work placement	Not applicable	

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