University of Gdańsk

Subject card

<table>
<tr><td>Subject name and code</td><td colspan="6">Commercial and Investment Banking, PG_00156843</td></tr>
<tr><td>Field of study</td><td colspan="6">Finance and Accounting</td></tr>
<tr><td>Date of commencement of studies</td><td colspan="2">October 2024</td><td colspan="2">Academic year of realisation of subject</td><td colspan="2">2025/2026</td></tr>
<tr><td>Education level</td><td colspan="2">undergraduate studies</td><td colspan="2">Subject group</td><td colspan="2">Optional subject group
Subject group related to scientific research in the field of study</td></tr>
<tr><td>Mode of study</td><td colspan="2">full-time studies</td><td colspan="2">Mode of delivery</td><td colspan="2">at the university</td></tr>
<tr><td>Year of study</td><td colspan="2">2</td><td colspan="2">Language of instruction</td><td colspan="2">Polish</td></tr>
<tr><td>Semester of study</td><td colspan="2">4</td><td colspan="2">ECTS credits</td><td colspan="2">7.0</td></tr>
<tr><td>Learning profile</td><td colspan="2">academic</td><td colspan="2">Assessment form</td><td colspan="2"></td></tr>
<tr><td>Conducting unit</td><td colspan="6">Katedra Bankowości i Finansów -> Faculty of Management</td></tr>
<tr><td rowspan="2">Name and surname of lecturer (lecturers)</td><td colspan="2">Subject supervisor</td><td colspan="4">dr Marta Penczar</td></tr>
<tr><td colspan="2">Teachers</td><td colspan="4"></td></tr>
<tr><td rowspan="3">Lesson types</td><td>Lesson type</td><td>Lecture</td><td>Tutorial</td><td>Laboratory</td><td>Project</td><td>Seminar</td><td>SUM</td></tr>
<tr><td>Number of study hours</td><td>30.0</td><td>30.0</td><td>15.0</td><td>0.0</td><td>0.0</td><td>75</td></tr>
<tr><td colspan="7">E-learning hours included: 0.0</td></tr>
<tr><td rowspan="2">Learning activity and number of study hours</td><td>Learning activity</td><td colspan="2">Participation in didactic classes included in study plan</td><td>Participation in consultation hours</td><td>Self-study</td><td>SUM</td></tr>
<tr><td>Number of study hours</td><td colspan="2">75</td><td>14.0</td><td>86.0</td><td>175</td></tr>
<tr><td>Subject objectives</td><td colspan="6">To impart knowledge of the principles of commercial and investment banking and its offerings</td></tr>
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Learning outcomes	Course outcome	Subject outcome	Method of verification
	[FiRL3_W07] The student has advanced knowledge of norms and rules (legal, organizational, moral and ethical) in finance and accounting. Knows and understands the concepts and principles of industrial property protection and copyright law.	Has advanced knowledge of norms and rules (legal, organisational, moral and ethical) in commercial and investment banking	[SW4] test/exam - oral or written [SW2] presentation/project/paper/report
	[FiRL3_K01] Self-development: - understands the need for development and lifelong learning - is able to supplement and improve the acquired knowledge and skills - knows his strengths and weaknesses, sets ambitious goals to the best of his ability - knows how to accept failure and admit mistakes.	Understands the need for development and lifelong learning - is able to complement and improve acquired knowledge and skills	[SK1] oral statement/conversation/discussion [SK5] implementation of a problem task
	[FiRL3_W02] The student has advanced knowledge of various types of economic structures and institutions and changes in them, in particular: banking system, insurance system, taxation system, financial markets, organization of the public finance system and the private sector. The student knows the interrelationships between these structures and social institutions on a national and international scale.	Has advanced knowledge of different types of economic structures and institutions and the changes taking place in commercial and investment banking	[SW4] test/exam - oral or written [SW2] presentation/project/paper/report
	[FiRL3_W08] The student knows the principles of evaluating projects in the field of finance (profitability of investment projects, assessment of the financial situation of the organization, risk assessment, threat of bankruptcy).	Is familiar with the principles of commercial and investment banking business evaluation	[SW4] test/exam - oral or written [SW1] oral statement/conversation/discussion
	[FiRL3_U01] The student understands and can correctly interpret complex economic phenomena in finance and accounting, and other social sciences. The student understands and can explain the content of announcements of economic institutions, articles published in the daily press and journals in the field of finance (excluding scientific journals). The student correctly applies concepts of social sciences.	Understands and can correctly interpret complex economic phenomena in commercial and investment banking	[SU1] oral statement/conversation/discussion [SU4] test/exam - oral or written
	[FiRL3_K03] Communication: - is able to present his view, issue in a way that others can understand - boldly (but thoughtfully) expresses his opinion, is not afraid to ask questions - is able to culturally participate in discussions - is able to give constructive criticism.	Able to present his/her view in a way that others can understand, boldly (but thoughtfully) expresses his/her opinion on phenomena in commercial and investment banking	[SK1] oral statement/conversation/discussion [SK2] presentation/project/paper/report
	[FiRL3_U03] The student can properly analyse the causes, course and effects of specific processes and phenomena in finance and accounting, using advanced theories and relevant social sciences methods. Can identify stakeholders of processes and phenomena from the disciplines of management and quality sciences and economics and finance.	Can properly analyse the causes, course and effects of specific processes and phenomena in commercial and investment banking	[SU2] presentation/project/paper/report [SU4] test/exam - oral or written

	Course outcome	Subject outcome	Method of verification
	[FiRL3_U06] The student uses the acquired knowledge to resolve dilemmas arising in professional work. The student is able to solve advanced problems in finance and accounting that arise in business practice: - compare financial instruments, - evaluate the profitability of the enterprise, - evaluate the financial position of the organization against the industry, - propose appropriate solutions to tax problems, - identify and select appropriate risk management methods, - construct an enterprise insurance protection program, - select sources of financing for the organization, - construct an appropriate accounting/control system.	Can solve advanced commercial and investment banking problems	[SU1] oral statement/conversation/discussion [SU5] implementation of a problem task
	[FiRL3_K04] Integrity: - abides by business ethics - respects the law - is objective, is able to recognize conflicts of interest - correctly identifies and resolves dilemmas related to the practice of the profession.	Able to perceive conflicts of interest - correctly identifies and resolves dilemmas related to the practice of the profession in the commercial and investment banking segment	[SK1] oral statement/conversation/discussion [SK2] presentation/project/paper/report

Subject contents	LECTURE: 1. The financial system and its stability 2. Universal bank management - Commercial and investment banking - features, advantages, disadvantages, business lines 3. Treasury management (Corporate and investment banking) 4. Credit products (Corporate and investment banking) 5. Credit application and agreement (Corporate and investment banking) 6. Derivatives (Corporate and Investment Banking) 7. Other financial products (Corporate and investment banking) 8. Relationship banking (Corporate and investment banking) 9. Retail banking 10. Retail settlement products 2h 11. Retail credit products 12. Mortgage credit for private individuals 13. Retail savings products 14. Trends in the banking market EXERCISES: 1. Financial crises 2. Investment in financial markets 3. Universal bank strategies 4. Assessing the financial situation and market position of a universal bank 5. Credit versus leasing 6. Share and bond issues - requirements 7. Mergers and acquisitions - the role of the investment bank 8. Modern settlement products - the role of the FinTech sector 9. Housing credit 10. Credit agreement 11. Market risk in mortgage lending 12. The bank adviser in the face of artificial intelligence 13. Private banking 14. Consumer protection in the financial services market LABORATORIES: 1. The global financial crisis of 2007-2009 - origins and repercussions for world finance and Poland 2. Analysis of universal bank services 3. Investments in the real estate market 4. Credit offer 5. Credit application and contract 6. Interest rate risk 7. Financial and non-financial aspects of investment financing through various instruments 8. Segmentation of the universal banking market
Prerequisites and co-requisites	

Assessment methods and criteria	Subject passing criteria	Passing threshold	Percentage of the final grade
	Lecture	51.0%	40.0%
	Laboratory	51.0%	20.0%
	Exercises	51.0%	40.0%

Recommended reading	Basic literature	A.1. used during the classes Iwanicz-Drozdowska M., Financial management of a bank in the digital era, Polskie Wydawnictwo Ekonomiczne, 2021 Niedziółka P., Investment banking, Investors, banks and investment firms in the financial market, Difin, 2015 Szelągowska A (ed.) Współczesna bankowość inwestycyjna, CeDeWu, 2009 A.2. studied independently by the student Zaleska, World of Banking, Difin, Warsaw 2018 Koleśnik J., Bankowość detaliczna, Difin, Warszawa 2016 Corporate banking, ed. Maciej S. Wiatr, Difin, 2015
	Supplementary literature	Recommendations of the Financial Supervision Authority, www.knf.gov.pl
	eResources addresses	Adresy na platformie eNauczanie:
Example issues/ example questions/ tasks being completed		
Work placement	Not applicable	

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