Subject card

Subject name and code	Fundamental Analysis, PG_00157045		
Field of study	Finance and Accounting		
Date of commencement of studies	October 2024	Academic year of realisation of subject	2026/2027
Education level	undergraduate 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	full-time studies	Mode of delivery	at the university
Year of study	3	Language of instruction	English
Semester of study	5	ECTS credits	3.0
Learning profile	academic	Assessment form	
Conducting unit	Katedra Inwestycji i Nieruchomości -> Faculty of Management		
Name and surname of lecturer (lecturers)	Subject supervisor	dr Krzysztof Kowalke	
	Teachers		

Lesson types	Lesson type	Lecture	Tutorial	Laboratory	Project	Seminar	SUM
	Number of study hours	15.0	15.0	0.0	0.0	0.0	30
	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	30	10.0	35.0	75

Subject objectives	The aim of the course is to provide students with knowledge about fundamental analysis and about making investment decisions on the stock market based on the procedure of fundamental analysis.

Learning outcomes	Course outcome	Subject outcome	Method of verification
	[FiRL3_W06] The student has advanced knowledge of methods and tools, including data acquisition and analysis techniques, appropriate to management science and quality, which allow describing economic structures and institutions and the processes within and between them.	Knows the methods and tools, including data acquisition and analysis techniques (fundamental analysis, PEST analysis, ratio analysis, SWOT analysis, Porter's 5 forces analysis, valuation methods), specific to economic sciences, allowing for the description of economic structures and institutions and the processes occurring within and between them	[SW4] test/exam - oral or written [SW2] presentation/project/paper/ report [SW5] implementation of a problem task
	[FiRL3_K02] Cooperation: - can harmoniously interact and work in a group, taking on different roles in it - is able to agree with the group on goals and division of tasks - is open-minded and respects the differences of other team members.	Works in a team and takes on various team roles, has basic organizational skills that allow him to achieve goals related to planning and undertaking professional activities as an investment advisor	[SK1] oral statement/conversation/ discussion [SK2] presentation/project/paper/ report [SK4] test/exam - oral or written [SK8] observation of student's independent or team work
	[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.	Is able to correctly analyze the causes and effects of specific processes and phenomena in the area of financial investments, using basic theories and appropriate methods to support investment decisions, identifies stakeholders of processes and phenomena on financial markets	[SU1] oral statement/conversation/ discussion [SU2] presentation/project/paper/ report [SU8] observation of student's independent or team work
	[FiRL3_U04] The student can forecast economic processes and phenomena in finance and accounting using advanced methods and tools.	Forecasts economic processes and phenomena in the field of finance and accounting using standard methods and tools (fundamental analysis, PEST analysis, Porter's 5 forces analysis,)	[SU1] oral statement/conversation/ discussion [SU2] presentation/project/paper/ report [SU4] test/exam - oral or written

Subject contents	1. Factors affecting the value of financial instruments 2. Introduction to fundamental analysis procedures 3. Macroeconomic analysis 4. Sector analysis 5. Situation analysis 6. Financial analysis 7. Introduction to valuation process
Prerequisites and co-requisites	

Assessment methods and criteria	Subject passing criteria	Passing threshold	Percentage of the final grade
	semester project	51.0%	40.0%
	written exam	51.0%	60.0%

Recommended reading	Basic literature	Economics, CFA Program Curriculum, Level I, Volume 2, 2019 Corporate finance and portfolio management, CFA Program Curriculum, Level I, Volume 4, 2019 Equity and fixed income, CFA Program Curriculum, Level I, Volume 5, 2019
	Supplementary literature	B. Graham, J. Zweig, W.E. Buffett: The Intelligent Investor: The Definitive Book on Value Investing. A Book of Practical Counsel, HarperCollins Publishers Inc, 2003 F. K. Reilly, K. C. Brown: Analysis of Investments and Management of Portfolios, Cengage Learning, 2015
	eResources addresses	Adresy na platformie eNauczanie:
Example issues/ example questions/ tasks being completed		

Work placement	Not applicable

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