

Subject card

Subject name and code	Credit Institutions Analysis, PG_00157168						
Field of study	Finance and Accounting						
Date of commencement of studies	October 2024		Academic year of realisation of subject		2024/2025		
Education level	Master'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	1		ECTS credits		2.0		
Learning profile	academic		Assessment form		credit		
Conducting unit	Department of Corporate Finance -> Faculty of Management -> Rector						
Name and surname of lecturer (lecturers)	Subject supervisor		dr Dawid Szramowski				
	Teachers		dr Maciej Goniszewski				
Lesson types	Lesson type	Lecture	Tutorial	Laboratory	Project	Seminar	SUM
	Number of study hours	8.0	10.0	0.0	0.0	0.0	18
	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	18		24.0		8.0	50
Subject objectives	Understanding the theoretical and methodological foundations of financial institutions analysis, and acquiring practical skills for independently assessing their financial condition, particularly: • Interpretation of financial statements of financial institutions • Assessment of the financial condition of financial institutions based on preliminary analysis and key financial ratios						

Learning outcomes	Course outcome	Subject outcome	Method of verification
	[FiRMU2_U01] The student understands and can correctly interpret complex economic phenomena in finance and accounting and basic ones in other social sciences. The student understands and can explain in depth the content of communications of economic institutions, articles in the press and magazines in the field of finance. The student correctly applies concepts of social sciences.	The student understands and can accurately interpret complex economic phenomena in the field of finance and accounting of credit institutions. They are capable of deeply explaining the content of communications from banks as well as articles published in financial journals and magazines. Additionally, they correctly apply concepts related to the financial analysis of credit institutions.	[SU2] presentation/project/paper/report
	[FiRMU2_K02] Cooperation: - the student can harmoniously interact and work in a group, assuming various roles in the group, including leadership and supervision of the group, - can agree with the group on goals and division of tasks, - is open-minded, respecting the differences of other team members.	He/She is able to collaborate effectively within a team, assuming various roles, including that of a leader and a supervisor. He/She can agree on goals with the team and fairly divide tasks, while also demonstrating openness and respect for the diversity of other team members.	[SK2] presentation/project/paper/report
	[FiRMU2_K03] Communication: - the student can present his/her view/ issue in a way that others can understand, - courageously (but prudently) expresses his opinion, is not afraid to ask questions, - can participate culturally in the discussion, - can give constructive criticism, - can communicate on specialized topics in finance and accounting with a diverse audience.	The student can clearly present their views on issues related to the financial analysis of credit institutions. They express their opinions boldly but thoughtfully and are not afraid to ask questions. The student is able to participate in discussions respectfully, offer constructive criticism, and communicate on specialized topics in finance and accounting with a diverse audience.	[SK1] oral statement/conversation/discussion [SK2] presentation/project/paper/report
	[FiRMU2_U03] The student can analyse in depth the causes, course and effects of processes and phenomena in finance and accounting using advanced theories and appropriate social sciences methods. Can verify simple research hypotheses. Can collect data using information technology.	The student is capable of deeply analyzing the causes, course, and effects of processes and phenomena in the field of finance and accounting of credit institutions, utilizing financial analysis tools. They have the ability to verify simple research hypotheses and effectively gather data using information technology.	[SU1] oral statement/conversation/discussion [SU2] presentation/project/paper/report
	[FiRMU2_W07] The student knows in detail the principles of project evaluation of finance and accounting (profitability of investment projects, assessment of the financial situation of the organization, risk assessment, threat of bankruptcy). The student can identify risks associated with the activities of the organization and correctly determine their consequences and methods of mitigation with the skillful use of theoretical knowledge using a specific research method.	The student has a detailed understanding of the principles for evaluating financial and accounting ventures, such as the profitability of investment projects, assessment of the financial condition of credit institutions, risk evaluation, and bankruptcy threats. They can identify the types of risks associated with the operations of credit institutions, accurately determine their consequences, and apply appropriate methods to mitigate them, effectively utilizing theoretical knowledge and relevant research methods.	[SW1] oral statement/conversation/discussion [SW2] presentation/project/paper/report
	[FiRMU2_W05] The student has an extended knowledge of advanced methods and tools, including data acquisition and analysis techniques, specific to the social sciences to describe economic structures and institutions and the processes within and between them.	The student has advanced knowledge of sophisticated methods and tools, including data acquisition and analysis techniques relevant to social sciences, which enable the description of economic structures and institutions, particularly credit institutions such as banks, as well as the processes occurring within them.	[SW4] test/exam - oral or written [SW2] presentation/project/paper/report

	Course outcome	Subject outcome	Method of verification
	[FiRMU2_K01] Self-improvement: - understands the need for development and lifelong learning, - inspires others to learn, - is able to supplement and improve the acquired knowledge and skills, expanded by the interdisciplinary dimension, - knows his strengths and weaknesses, sets ambitious goals to the best of his ability, - knows how to reconcile with failure, admit to a mistake.	The student understands the need for continuous development and lifelong learning, particularly in the field of financial analysis of credit institutions, and is aware of the changes occurring in the financial sector. They can inspire others to learn, effectively supplement and enhance their acquired knowledge and skills, expanding them with interdisciplinary aspects. The student knows their strengths and weaknesses, sets ambitious goals appropriate to their abilities, and is also able to accept failure and admit mistakes.	[SK1] oral statement/conversation/discussion [SK2] presentation/project/paper/report
	[FiRMU2_U02] The student can use advanced theoretical knowledge to describe the causes and course of economic processes and phenomena. The student can formulate his own critical opinions.	He/She is capable of applying advanced theoretical knowledge to analyze and explain the causes and dynamics of economic processes and phenomena, particularly in financial analysis. He/She can also formulate independent critical opinions.	[SU1] oral statement/conversation/discussion [SU2] presentation/project/paper/report
	[FiRMU2_W08] The student has in-depth knowledge of the formation and economic functioning of organizations commercial and public, their forms, phases of development, as well as financial conditions determining their value and economic success.	The student has in-depth knowledge of the formation and economic functioning of credit institutions, their forms, stages of development, and the financial conditions that determine their value and economic success.	[SW4] test/exam - oral or written [SW1] oral statement/conversation/discussion [SW2] presentation/project/paper/report
Subject contents	1. General Overview of Financial Institutions' Activities - Banks, insurance companies, pension funds and companies, investment funds and companies - Supervision of financial institutions 2. Financial Reporting of Financial Institutions3. Directions and Principles of Financial Analysis of Financial Institutions Considering the Specifics of Various Financial Institutions4. Other Tools for Evaluating Financial Institutions - Economic profit		
Prerequisites and co-requisites	- Financial Analysis (understanding the essence, methods, sources, and principles of preliminary and ratio financial analysis) - Fundamentals of Banking and Credit Institution Management - Fundamentals of Accounting (understanding the structure of financial statements and their essence, as well as the informational limitations arising from various accounting principles)		
Assessment methods and criteria	Subject passing criteria	Passing threshold	Percentage of the final grade
	Written test	51.0%	40.0%
	Final project	51.0%	60.0%
Recommended reading	Basic literature	- Marcinkowska, M. (2007). <i>Ocena działalności instytucji finansowych</i>. Warszawa: Difin. - Iwanicz-Drozdowska, M. (2000). <i>Metody oceny działalności banku</i>. Warszawa: Poltext. - Iwanicz-Drozdowska, M. (2005). <i>Zarządzanie finansowe bankiem</i>. Warszawa: PWE. - Lisowski, J. (1994). <i>Ocena sytuacji finansowej zakładów ubezpieczeń</i>. Łódź. - Monkiewicz, J., Gąsioriewicz, L., & Hadyniuk, B. (2000). <i>Zarządzanie finansami ubezpieczeń</i>. Warszawa. - Iwanicz-Drozdowska, M., Jaworski, Wł. L., & Zawadzka, Z. (2006). <i>Bankowość: zagadnienia podstawowe</i>. Warszawa: Poltext. - Jaworski, Wł. L., & Zawadzka, Z. (Red.). (2004). <i>Bankowość - podręcznik akademicki</i>. Warszawa: Poltext.	
	Supplementary literature	- Bień, W., & Sokół, H. (1998). <i>Ocena sytuacji finansowej banku komercyjnego</i>. Warszawa: Difin. - Sangowski, T. (Red.). (2001). <i>Ubezpieczenia gospodarcze</i>. Warszawa.	
	eResources addresses		

Example issues/ example questions/ tasks being completed	
Work placement	Not applicable

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