

Subject card

Subject name and code	Intelligent investor - lecture, PG_00134101						
Field of study	Taxes and Tax Consultancy						
Date of commencement of studies	October 2025		Academic year of realisation of subject		2026/2027		
Education level	Master's studies		Subject group		Optional subject group		
Mode of study	part-time studies		Mode of delivery		at the university		
Year of study	2		Language of instruction		Polish		
Semester of study	4		ECTS credits		2.0		
Learning profile	academic		Assessment form		credit		
Conducting unit	Faculty of Law and Administration -> Rector						
Name and surname of lecturer (lecturers)	Subject supervisor		dr Sławomir Kujawa				
	Teachers						
Lesson types	Lesson type	Lecture	Tutorial	Laboratory	Project	Seminar	SUM
	Number of study hours	14.0	0.0	0.0	0.0	0.0	14
	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	14		0.0		36.0	50
Subject objectives	The main objective of the course is to familiarize students with the process of building and managing an investment portfolio.						

Learning outcomes	Course outcome	Subject outcome	Method of verification
	[PiDPMU2_WG03] has in-depth knowledge of the subject of regulation of selected detailed issues outside the scope of branches of substantive and formal law related to public levies, as well as outside the scope of accounting	The student understands financial issues beyond classical accounting in the context of investment planning and portfolio management. The student is able to analyze investment decisions, taking into account tax and financial aspects beyond standard substantive law and accounting. The student has the knowledge to assess the financial and tax implications of investments in various market scenarios.	[SW4] test/exam - oral or written [SW2] presentation/project/paper/report
	[PiDPMU2_WK04] understands the fundamental dilemmas of modern civilization, especially those related to public finances	The student understands the main challenges of modern civilization related to public finances and their impact on capital markets. The student is able to assess the consequences of financial decisions made by individuals and the state in the context of social and economic problems. The student recognizes the complexity of ethical and economic dilemmas in investment decision-making. The student is able to incorporate the analysis of social and financial dilemmas into the process of planning and making investment decisions.	[SW4] test/exam - oral or written [SW2] presentation/project/paper/report
Subject contents	Investing vs. speculating on the investment market differences Basic financial and tangible instruments belonging to classic and alternative investments Building an investment portfolio (goals, investment horizon, risk appetite) The role of fundamental analysis in the process of selecting components and managing an investment portfolio The role of technical analysis in the process of selecting components and managing an investment portfolio Investing in investment funds (actively and passively managed) Investment errors on the motivational and cognitive levels The role of an investment advisor/robo-advisor in the process of building and managing an investment portfolio		
Prerequisites and co-requisites			
Assessment methods and criteria	Subject passing criteria	Passing threshold	Percentage of the final grade
	Project	51.0%	30.0%
	Written test	51.0%	70.0%
Recommended reading	Basic literature	B. Graham (tłum. D. Bakalarz, R. Madejski), Inteligentny inwestor, Wydawnictwo EMKA, Warszawa 2006. S. Kujawa, Inwestycje klasyczne i alternatywne w kontekście uwarunkowań behawioralnych, Wydawnictwo UG, Gdańsk 2020, E. Ostrowska, Behawioralny portfel inwestycyjny. Mózg. Emocje. Luka behawioralna, Wydawnictwo UG, Gdańsk 2020, E. Ostrowska, Portfel inwestycyjny, klasyczny i alternatywny. Metody oceny, Wydawnictwo CH Beck, Warszawa 2014,	
	Supplementary literature	U. Ziarko-Siwiek (red.), Tradycyjne i alternatywne inwestycje finansowe w świetle kryzysu finansowego, Wydawnictwo CeDeWu, Warszawa 2012, M. Broszkiewicz, M. Pauka (red.), Podstawy rynku finansowego. Przykłady i zadania, Wydawnictwo UE we Wrocławiu, Wrocław 2019, D. Sierakowska, Świat surowców (wydanie drugie rozszerzone), Wydawnictwo Trend Edukacja Finansowa, Warszawa 2016.	
	eResources addresses		
Example issues/ example questions/ tasks being completed	Investing and speculating on the investment market differences Basic financial and tangible instruments belonging to classic and alternative investments Building an investment portfolio (goals, investment horizon, risk appetite) The role of fundamental analysis in the process of selecting components and managing an investment portfolio The role of technical analysis in the process of selecting components and managing an investment portfolio Investing in investment funds (actively and passively managed) Investment errors on the motivational and cognitive levels The role of an investment advisor/robo-advisor in the process of building and managing an investment portfolio		

Work placement	Not applicable
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