

Subject card

Subject name and code	Fundamental & Technical Analysis, PG_00178641						
Field of study	Finance and Accounting						
Date of commencement of studies	October 2026	Academic year of realisation of subject			2028/2029		
Education level	Bachelor's studies	Subject group			Obligatory subject group in the field of study Optional subject group 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			5.0		
Learning profile	academic	Assessment form			credit		
Conducting unit	Department of Investment and Real Estate -> Faculty of Management -> Rector						
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	30.0	30.0	0.0	0.0	0.0	60
	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	60		4.0		61.0	125
Subject objectives	The aim of the course is to provide students with knowledge of both fundamental and technical analysis of financial instruments, and to prepare them for making investment decisions and managing investments on the stock market based on these analytical tools.						

Learning outcomes	Course outcome	Subject outcome	Method of verification
	[FiRL3_U04] The student is able—from the perspective of finance and accounting—to correctly select and properly apply methods and tools from the fields of management and quality sciences, economics, and finance to analyse and forecast economic processes and evaluate economic phenomena.	The student selects and applies appropriate methods and tools of technical and fundamental analysis to manage an investment portfolio and to predict stock price movements on the capital market.	[SU2] presentation/project/paper/report [SU5] implementation of a problem task
	[FiRL3_W02] The student has advanced knowledge and understanding of the functioning of the domestic and international financial market and financial instruments and institutions.	The student demonstrates advanced recognition of the principles and tools of technical and fundamental analysis and applies them in the analysis of financial instruments.	[SW4] test/exam - oral or written [SW2] presentation/project/paper/report [SW5] implementation of a problem task
	[FiRL3_U03] The student can obtain data and verify its accuracy from appropriately selected sources and use these data to analyse and evaluate economic processes and phenomena in management and quality sciences, economics and finance.	The student acquires financial and non-financial data from databases related to companies listed on public stock exchanges, assesses their reliability, and applies them in performing fundamental and technical analysis.	[SU2] presentation/project/paper/report [SU5] implementation of a problem task
	[FiRL3_U02] The student can identify, analyze or design adequate solutions to problems in finance and accounting.	The student analyzes financial instruments on the capital market using tools of technical and fundamental analysis to support investment decision-making.	[SU2] presentation/project/paper/report [SU5] implementation of a problem task
Subject contents	<ol style="list-style-type: none"> 1. Factors affecting the value of financial instruments 2. Introduction to fundamental analysis procedures 3. Macroeconomic analysis 4. Sector analysis 5. Situation analysis 6. Making investment decisions based on the results of conducted fundamental analysis 7. Introduction to technical analysis principles 8. Types of charts and trends 9. Marking trend, support and resistance lines 10. Technical formations 11. Trend changing signals 12. Indicators related to technical analysis 13. The use of Fibonacci numbers and Elliott wave theory in investing in financial markets 		
Prerequisites and co-requisites	The student is expected to have a basic understanding of the functioning of the financial market.		

Assessment methods and criteria	Subject passing criteria	Passing threshold	Percentage of the final grade
	Written test as a form of assessment for the tutorials	51.0%	30.0%
	Semester project and presentation	51.0%	30.0%
	Written test as a form of assessment for the lecture	51.0%	40.0%
Recommended reading	Basic literature	<ol style="list-style-type: none"> 1. Economics, CFA Program Curriculum, Level I, Volume 2, 2019 2. Corporate finance and portfolio management, CFA Program Curriculum, Level I, Volume 4, 2019 3. Equity and fixed income, CFA Program Curriculum, Level I, Volume 5, 2019 4. Pring M.J.: Technical Analysis Explained: The Successful Investor's Guide to Spotting Investment Trends and Turning Points, McGraw-Hill, 2002. 	
	Supplementary literature	<ol style="list-style-type: none"> 1. Graham B., Zweig J., Buffett W.E., The Intelligent Investor: The Definitive Book on Value Investing. A Book of Practical Counsel, HarperCollins Publishers Inc, 2003 2. Reilly F. K., Brown K. C., Analysis of Investments and Management of Portfolios, Cengage Learning, 2015 3. Murphy J.J., Technical Analysis of the Financial Markets: A Comprehensive Guide to Trading Methods and Applications, New York Institute of Finance S., 1998. 4. Nison S.. Japanese Candlestick Charting Techniques, Prentice Hall, 2011. 	
	eResources addresses		
Example issues/ example questions/ tasks being completed			
Work placement	Not applicable		

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