



MODULE SPECIFICATION

Part 1: Information			
Module Title	Market Analysis for Private Investors		
Module Code	UMAD5M-15-2	Level	Level 5
For implementation from	2020-21		
UWE Credit Rating	15	ECTS Credit Rating	7.5
Faculty	Faculty of Business & Law	Field	Accounting and Finance
Department	FBL Dept of Accounting Economics & Finance		
Module Type:	Standard		
Pre-requisites	Understanding Business and Financial Information (Accounting, Economics and Finance) 2020-21		
Excluded Combinations	None		
Co-requisites	None		
Module Entry Requirements	None		
PSRB Requirements	None		

Part 2: Description
<p>Overview: Pre-requisites: students must take one out of UMAD4U-15-1 (Business International and Mangement), UMAD4V-15-1 (Marketing Enterprise and Tourism) or UMAD4W-15-1 (Accounting, Economics and Finance) or UMADDN-15-1 (Marketing, Events and Tourism)</p> <p>Educational Aims: See Learning Outcomes.</p> <p>Outline Syllabus: Investment theory – Key investment theories influencing private investment decision making and private portfolio construction, including and understanding of key elements of behavioural finance.</p> <p>Equity markets – the nature and workings of the UK equity and bond markets; how to evaluate sources of financial information, use of multiple data resources including portfolio simulation packages; diversification and investment strategies in private portfolio construction; bonds and their place in private investment portfolios.</p> <p>Interpretation and application of financial and accounting information: investment ratios; sources of information for investment decision making.</p> <p>Collective Investment: the structure of collective investment instruments; comparative performance evaluation in a private investor context; packaged products.</p>

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Teaching and Learning Methods: Scheduled learning

Contact time will be 3 hours per week. This will be a combination of lectures, lectorials and tutorial sessions.

Weekly lectures will focus on content and underpinning of key aspects of investment theory and applied portfolio management principles.

Lectorials will be supported by virtual lectures incorporating short developmental activities, which will then be further explored in the lectorial hour with interactive discussion and explanation.

Tutorial time will be used to allow students to integrate and develop knowledge from multiple sources through a variety of group and individual activities including discussions presentation and practical problem solving activities.

Students will be encouraged to reflect on their learning through a variety of methods, which may include personal logs, discussion boards, and formal and informal feedback.

Independent learning - students are expected to spend approx 2 hours per week preparation for each hour of contact time, including reading, problem solving, research and group discussions.

Students will be working in assignment groups from a very early stage in the module and these groups will also operate as learning sets operating both outside the classroom and within the module contact time.

Assignment related group activities and exam preparation will take up the equivalent of an additional 2 – 4 hours per week.

Part 3: Assessment

The majority of the learning outcomes are tested in the Group Investment Game which is an applied portfolio management exercise requiring real time evaluation of company information and performance, and decision making in the context of a self selected portfolio. This will allow students to apply their skills and understanding in selecting and managing investments in a personal portfolio structure. It will also give students the opportunity to work in groups and use a variety of data research, data evaluation and data presentation tools. The module will also assess student's understanding of key portfolio management theories and strategies through an online open book examination.

Summative Assessment

Component A Examination Students sit an online open book examination completed in a 24 hour period at the end of the module to demonstrate understanding of theory, strategy and the use of financial information .

Component B Coursework This a group assessment in the form of an investment game, requiring students to identify suitable investments for their chosen client and manage them in a real time virtual portfolio over a time constrained period . Once the portfolio is created, students are required to monitor, review and revise their portfolio and comply with regular reporting dates (15% of component). They must submit a 1500 word summary of their portfolio performance against their client's objectives, supported by a portfolio of evidence and justification for their investment decisions (75% of component) including an individual reflection on their learning (10% of component).

First Sit Components	Final Assessment	Element weighting	Description
Group work - Component B		60 %	Group Investment Game
Examination (Online) - Component A	✓	40 %	Online open book exam, 24 hour window
Resit Components	Final Assessment	Element weighting	Description

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Report - Component B		60 %	Individual investment report (1500 words)
Examination (Online) - Component A	✓	40 %	Online open book examination in 24 hour window

Part 4: Teaching and Learning Methods																					
Learning Outcomes	<p>On successful completion of this module students will achieve the following learning outcomes:</p> <table border="1"> <thead> <tr> <th>Module Learning Outcomes</th> <th>Reference</th> </tr> </thead> <tbody> <tr> <td>Understand, evaluate and apply key investment theories in the context of a private investment portfolio decision making.</td> <td>MO1</td> </tr> <tr> <td>Evaluate the operation and performance of UK equity markets.</td> <td>MO2</td> </tr> <tr> <td>Demonstrate the application of financial market instruments in the construction of a private investment portfolio.</td> <td>MO3</td> </tr> <tr> <td>Identify, access and understand multiple sources of financial information.</td> <td>MO4</td> </tr> <tr> <td>Critically evaluate financial, market and economic data for investment decision making in the context of a private investment portfolio.</td> <td>MO5</td> </tr> <tr> <td>Calculate, interpret and apply key investment ratios</td> <td>MO6</td> </tr> <tr> <td>Confidently communicate conclusions and recommendations in oral and written form.</td> <td>MO7</td> </tr> <tr> <td>Contribute effectively as part of a team in group tasks.</td> <td>MO8</td> </tr> <tr> <td>Evaluate own performance and reflect on own learning, seeking a making use of feedback.</td> <td>MO9</td> </tr> </tbody> </table>	Module Learning Outcomes	Reference	Understand, evaluate and apply key investment theories in the context of a private investment portfolio decision making.	MO1	Evaluate the operation and performance of UK equity markets.	MO2	Demonstrate the application of financial market instruments in the construction of a private investment portfolio.	MO3	Identify, access and understand multiple sources of financial information.	MO4	Critically evaluate financial, market and economic data for investment decision making in the context of a private investment portfolio.	MO5	Calculate, interpret and apply key investment ratios	MO6	Confidently communicate conclusions and recommendations in oral and written form.	MO7	Contribute effectively as part of a team in group tasks.	MO8	Evaluate own performance and reflect on own learning, seeking a making use of feedback.	MO9
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Reading List	<p>The reading list for this module can be accessed via the following link:</p> <p>https://uwe.rl.talis.com/modules/umad5m-15-2.html</p>																				

Part 5: Contributes Towards
<p>This module contributes towards the following programmes of study:</p> <p>Business Management with Accounting and Finance {Top-Up} [Sep][SW][Frenchay][3yrs] BA (Hons) 2020-21</p> <p>Business Management with Accounting and Finance [Sep][FT][Frenchay][2yrs] BA (Hons) 2020-21</p>

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Accounting and Finance [Sep][SW][Frenchay][4yrs] BA (Hons) 2019-20
Accounting [Sep][SW][Frenchay][4yrs] BSc (Hons) 2019-20
Business and Management [Sep][FT][NepalBrit][3yrs] BBA (Hons) 2019-20
Business Management with Accounting and Finance [Sep][FT][Frenchay][3yrs] BA (Hons) 2019-20
Business Management with Accounting and Finance [Sep][SW][Frenchay][4yrs] BA (Hons) 2019-20
Banking and Finance [Sep][FT][Frenchay][3yrs] BA (Hons) 2019-20
Accounting and Finance [Sep][SW][Frenchay][4yrs] BA (Hons) 2019-20
Accounting and Finance {Dual} [Aug][FT][Taylors][3yrs] BA (Hons) 2019-20
Accounting and Finance {Dual} [Mar][FT][Taylors][3yrs] BA (Hons) 2019-20
Banking and Finance [Sep][SW][Frenchay][4yrs] BA (Hons) 2019-20
Banking and Finance {Dual} [Aug][FT][Taylors][3yrs] BA (Hons) 2019-20
Banking and Finance {Dual} [Mar][FT][Taylors][3yrs] BA (Hons) 2019-20
Banking and Finance [Sep][FT][NEU][3yrs] BA (Hons) 2019-20
Accounting and Finance [Sep][FT][Frenchay][3yrs] BA (Hons) 2019-20
Accounting [Sep][FT][Frenchay][3yrs] BSc (Hons) 2019-20
Accounting and Finance [Sep][SW][Villa][4yrs] BSc (Hons) 2019-20
Accounting and Finance [Jan][SW][Villa][4yrs] BSc (Hons) 2019-20
Accounting and Finance [May][SW][Villa][4yrs] BSc (Hons) 2019-20
Accounting and Finance [Sep][FT][Villa][3yrs] BSc (Hons) 2019-20
Accounting and Finance [Jan][FT][Villa][3yrs] BSc (Hons) 2019-20
Accounting and Finance [May][FT][Villa][3yrs] BSc (Hons) 2019-20
International Business Management [Sep][FT][Frenchay][3yrs] BA (Hons) 2019-20
Business Studies {Dual} [Aug][FT][Taylors][3yrs] BA (Hons) 2019-20
Business and Management [Sep][SW][Frenchay][4yrs] BA (Hons) 2019-20
Business Administration [Jan][FT][Northshore][3yrs] BSc (Hons) 2019-20
Business and Management {Dual} [Sep][FT][Frenchay][3yrs] BA (Hons) 2019-20
Business and Management {Dual} [Aug][FT][Taylors][3yrs] BA (Hons) 2019-20
Business and Management [Jan][FT][Frenchay][3yrs] BA (Hons) 2019-20
Business Administration [Jan][SW][Northshore][4yrs] BSc (Hons) 2019-20
Business and Management [Sep][FT][Frenchay][3yrs] BA (Hons) 2019-20
Business and Management {Dual} [Mar][FT][Taylors][3yrs] BA (Hons) 2019-20
International Business Management {Dual} [Aug][FT][Taylors][3yrs] BA (Hons) 2019-20
International Business Management {Dual} [Mar][FT][Taylors][3yrs] BA (Hons) 2019-20
International Business Management {Dual} [Sep][FT][Frenchay][3yrs] BA (Hons) 2019-20
International Business Management [Sep][FT][NEU][3yrs] BA (Hons) 2019-20
International Business Management {Split Delivery} [Sep][FT][Frenchay][3yrs] BA (Hons) 2019-20
Business Management with Law [Sep][FT][Frenchay][3yrs] BA (Hons) 2019-20
Business and Law [Sep][FT][Frenchay][3yrs] BA (Hons) 2019-20
Business Management with Law [Sep][SW][Frenchay][4yrs] BA (Hons) 2019-20
Business and Law [Sep][SW][Frenchay][4yrs] BA (Hons) 2019-20
Accounting and Finance [Sep][FT][Frenchay][3yrs] BA (Hons) 2019-20

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Accounting and Finance {Foundation} [Sep][FT][Frenchay][4yrs] BA (Hons) 2018-19
Business Management with Accounting and Finance {Foundation} [Sep][SW][Frenchay][5yrs] BA (Hons) 2018-19
Business Management with Accounting and Finance {Foundation} [Sep][FT][Frenchay][4yrs] BA (Hons) 2018-19
Business Management with Law {Foundation} [Sep][SW][Frenchay][5yrs] BA (Hons) 2018-19
Business Management with Law {Foundation} [Sep][FT][Frenchay][4yrs] BA (Hons) 2018-19
Business and Law {Foundation} [Sep][SW][Frenchay][5yrs] BA (Hons) 2018-19
Accounting and Finance {Foundation} [Sep][SW][Frenchay][5yrs] BA (Hons) 2018-19
Business and Law {Foundation} [Sep][FT][Frenchay][4yrs] BA (Hons) 2018-19
Banking and Finance {Foundation} [Sep][FT][Frenchay][4yrs] BA (Hons) 2018-19
Banking and Finance {Foundation} [Sep][SW][Frenchay][5yrs] BA (Hons) 2018-19
Business and Management {Foundation} [Sep][SW][Frenchay][5yrs] BA (Hons) 2018-19
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