



Module Specification

Finance and Investment Project

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Part 1: Information

Module title: Finance and Investment Project

Module code: UMADXE-45-M

Level: Level 7

For implementation from: 2023-24

UWE credit rating: 45

ECTS credit rating: 22.5

Faculty: Faculty of Business & Law

Department: FBL Dept of Accounting Economics & Finance

Partner institutions: None

Field: Accounting and Finance

Module type: Module

Pre-requisites: None

Excluded combinations: None

Co-requisites: None

Continuing professional development: No

Professional, statutory or regulatory body requirements: None

Part 2: Description

Overview: Not applicable

Features: Not applicable

Educational aims: The aim of the module is to provide students with the opportunity to produce a substantial piece of individual research which is relevant to practitioners and/or researchers in the field of finance. The project involves a careful research and

provision of investment advice based on the analysis and valuation of two selected public companies. Each student will be supported by a research mentor.

Outline syllabus: The company analysis project involves the production of an analyst's report to include a macroeconomic analysis, industry analysis, and a company analysis on two companies within a given industry, the ultimate purpose of which is to provide credible and well researched investment recommendations. In in-depth understanding of the industry or sector of the selected companies is necessary. The research should include components such as a macroeconomic analysis, competitor and business model analysis, industry structure, industry outlook, and key variable financial analysis. The ultimate purpose is to provide investment advice grounded on credible and well-researched analysis of the industry as a whole.

It is the student's responsibility to select the country and sector of the target companies. The companies selection must be agreed with the supervisor at the outset and it is the responsibility of the student to ensure the project's feasibility, particularly in terms of data availability.

Part 3: Teaching and learning methods

Teaching and learning methods: Students will be encouraged to use the full range of data sources and analysis tools provided for Accounting and Finance postgraduate students. Students will employ the analytical frameworks provided in the Financial Statement Analysis module of Semester 1.

Once a student has been allocated a research mentor , they will agree upon a the identity of two target companies. There will then be periodic contact with mentors/supervisors, during which time the student will advise on the development of the research proposal into a formal plan of research, the review of existing literature and other information sources, data acquisition and manipulation, and the development of discussions, conclusions and recommendations.

Students will be actively encouraged to make themselves familiar with the study

skills web pages and in particular to read widely around the subject matter. Active use will be made of the Blackboard facilities.

Students are allocated a research mentor/supervisor who will provide necessary support for the development of their proposal and the ensuing research.

The mentor helps the student to build a portfolio of evidence covering four areas: aims and objectives, the macro environment, the industry, and data collection. The research mentor provides guidance and feedback on the portfolio submissions and acts as the immediate contact point when ideas need to be explored or problems addressed.

Module Learning outcomes: On successful completion of this module students will achieve the following learning outcomes.

MO1 Demonstrate an ethical approach to project management to plan and execute a significant piece of independent company analysis and research in the field of finance and investment

MO2 Communicate and defend conclusions using a variety of formats

MO3 Critically discuss and appraise current and core issues impacting investment decisions

MO4 Identify, apply and defend meaningful choices in relations to methodology and data

MO5 Evidence deep understanding of, and ability to reflect critically on, chosen research approach, process and feedback

MO6 Critically analyse data and consider the significance of the research findings to produce practical conclusions and recommendations

Hours to be allocated: 450

Contact hours:

Independent study/self-guided study = 450 hours

Total = 450

Reading list: The reading list for this module can be accessed at [readinglists.uwe.ac.uk](https://uwe.rl.talis.com/modules/umadbl-45-m.html) via the following link <https://uwe.rl.talis.com/modules/umadbl-45-m.html>

Part 4: Assessment

Assessment strategy: The assessment is designed to develop skills and allow the learning outcomes to be demonstrated. Students will work through the stages of a project and have the opportunity for formative feedback through discussion of their portfolio elements with their research mentor.

The summative assessment for the module includes 2 tasks:

Task 1: Portfolio submission and critical discussion (20 minutes)

Task 2: Analysis, conclusion and recommendations for practice. Written submission (2000 – 3000 words).

Assessment tasks:

Project (First Sit)

Description: Written piece

Weighting: 40 %

Final assessment: No

Group work: No

Learning outcomes tested: MO1, MO5, MO6

Project (First Sit)

Description: Portfolio and critical discussion

Weighting: 60 %

Final assessment: Yes

Group work: No

Learning outcomes tested: MO1, MO2, MO3, MO4, MO5

Project (Resit)

Description: Written piece

Weighting: 40 %

Final assessment: Yes

Group work: No

Learning outcomes tested: MO1, MO5, MO6

Project (Resit)

Description: Portfolio and critical discussion

Weighting: 60 %

Final assessment: No

Group work: No

Learning outcomes tested: MO1, MO2, MO3, MO4, MO5

Part 5: Contributes towards

This module contributes towards the following programmes of study:

Finance and Investment [Frenchay] MSc 2023-24