Module Specification

Market Analysis for Private Investors

Version: 2024-25, v5.0, 05 Jul 2024

Contents

Part 1: Information

Module title: Market Analysis for Private Investors

Module code: UMAD5M-15-2

Level: Level 5

For implementation from: 2024-25

UWE credit rating: 15

ECTS credit rating: 7.5

College: College of Business and Law

School: CBL Bristol Business School

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: No pre-requisite modules are required, however students may find it helpful to have passed one of the following modules (UMAD4U-15-1 Understanding Business and Financial Information (Business, International and Management); UMADDN-15-1 UBFI Understanding Business and Financial Information (Marketing, Events and Tourism); UMADMY-15-1 Foundations of Financial Accounting) before undertaking this module.

Features: Not applicable

Educational aims: See Learning Outcomes.

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.

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.

Interpretation and application of financial and accounting information: investment ratios; sources of information for investment decision making.

Collective Investment: the structure of collective investment instruments; comparative performance evaluation in a private investor context; packaged products.

Part 3: Teaching and learning methods

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.

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

MO1 Understand, evaluate and apply key investment theories in the context of a private investment portfolio decision making.

MO2 Evaluate the operation and performance of UK equity markets.

MO3 Demonstrate the application of financial market instruments in the construction of a private investment portfolio.

MO4 Identify, access and understand multiple sources of financial information.

MO5 Critically evaluate financial, market and economic data for investment decision making in the context of a private investment portfolio.

MO6 Calculate, interpret and apply key investment ratios

MO7 Confidently communicate conclusions and recommendations in oral and written form.

MO8 Contribute effectively as part of a team in group tasks.

MO9 Evaluate own performance and reflect on own learning, seeking a making use of feedback.

Hours to be allocated: 150

Contact hours:

Independent study/self-guided study = 114 hours

Face-to-face learning = 36 hours

Total = 0

Reading list: The reading list for this module can be accessed at readinglists.uwe.ac.uk via the following link https://uwe.rl.talis.com/modules/umad5m-15-2.html

Part 4: Assessment

Assessment strategy: 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

Task 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 .

Task 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, and complete a 1500 word group report. Students will also submit an individual reflection on their learning.

Assessment tasks:

Online Assignment (First Sit)
Description: Online MCQ coursework test
Weighting: 40 %
Final assessment: Yes
Group work: No
Learning outcomes tested: MO1, MO2, MO3, MO6

Set Exercise (First Sit)
Description: Group investment report
Weighting: 60 %
Final assessment: No
Group work: Yes
Learning outcomes tested: MO1, MO2, MO3, MO4, MO5, MO6, MO7, MO8, MO9

Online Assignment (Resit)
Description: Online MCQ coursework test
Weighting: 40 %
Final assessment: Yes
Group work: No
Learning outcomes tested:

Set Exercise (Resit)
Description: Group report. Groups of one permitted where necessary .
Weighting: 60 %
Final assessment: No
Group work: Yes
Learning outcomes tested:

Part 5: Contributes towards

This module contributes towards the following programmes of study:

Accounting and Finance [Phenikaa] BA (Hons) 2023-24

Accounting and Finance {Dual} [Taylors] BA (Hons) 2023-24

Banking and Finance [Frenchay] BSc (Hons) 2023-24

Accounting and Finance [Frenchay] BA (Hons) 2023-24

International Business Management {Dual} [Taylors] BA (Hons) 2023-24

Business and Management [Frenchay] BA (Hons) 2023-24

Business and Management {Dual} [Taylors] BA (Hons) 2023-24

International Business Management [Frenchay] BA (Hons) 2023-24

Business and Management [NepalBrit] BBA (Hons) 2023-24

Accounting [Frenchay] BSc (Hons) 2023-24

Accounting and Finance [Villa] BSc (Hons) 2023-24

Business and Law [Frenchay] BA (Hons) 2023-24

Accounting and Finance [BIBM] BSc (Hons) 2023-24

Accounting and Finance {Dual} [Taylors] BA (Hons) 2023-24

Business and Management [Phenikaa] BA (Hons) 2023-24

Banking and Finance {Dual} [Taylors] BA (Hons) 2023-24

Business and Management {Foundation} [Frenchay] BA (Hons) 2022-23

Business and Law {Foundation} [Frenchay] BA (Hons) 2022-23

Accounting {Foundation} [Frenchay] BSc (Hons) 2022-23

Business Management with Accounting and Finance {Foundation} [Sep][FT][Frenchay][4yrs] - Withdrawn BA (Hons) 2022-23

Business Management with Accounting and Finance {Foundation} [Sep][SW][Frenchay][5yrs] - Withdrawn BA (Hons) 2022-23

Accounting and Finance {Foundation} [Frenchay] BA (Hons) 2022-23

Banking and Finance {Foundation} [Frenchay] BSc (Hons) 2022-23