

Course form to fill in (2021-2022)

Course title:

Introduction to Stock Market Investing

Staff responsible for the course:

Lecturers:

Antonio Figueiredo

1) COURSE PRESENTATION

Aims:

Draw up a list of competencies and/or skills that the student should have acquired or improved at the end of the course.

You must fill in the field under the format “the student should be able to...” using action verbs such as define, realise, control... *(This description should not take more than ten lines)*

At the end of the course, the student should be able to:

Identify several financial instruments for gaining exposure to stock market returns, calculate periodic returns, calculate standard deviation of returns and correlation of returns between two risky assets, recognize the importance of portfolio diversification, identify the main factors/indicators and their impacts on stock market returns, recognize the implications of the Efficient Market Hypothesis to technical and fundamental analysis, calculate required rate or returns using Capital Asset Pricing Model given Beta and equity risk premium, identify factors in ESG investing, calculate and interpret some basic financial ratios, calculate intrinsic value of a stock using comparable ratios, calculate intrinsic value of a stock using dividend discount model and distinguish the impact of the business cycle on different industries.

Prerequisites:

You must not write courses' codes or names, but identify the preliminary skills as the knowledge or the know-how needed to efficiently follow this course.

Write it out in terms of knowledge and methodologies required to follow this course (this would help students from direct entry to position themselves). *(This description should not take more than five lines)*

Basic algebra including exponentiation properties and calculations, basic Excel skills including relative and absolute cell referencing and basic Excel graphing functionality.

Course contents:

Here, an abstract of the course can be given or the different chapters of the course can be simply written down.

(The description should not take more than ten lines)

- Basic investment strategies
- Investment vehicles & trading
- Returns, risks, and expectations
- The economy and the stock market
- Financial statements, ratios & stock screening
- ESG principles & general investment advice
- Equity valuation

2) WORKING LOAD

Here, you should allocate the effective working load of the course, including an estimation of the personal work required from the student.

TABLE 1

Course's types	Number of hours	Notes
<u>Effective presence</u>		
- <i>Magistral Course</i>		
- <i>Interactive Course</i>	16	
- <i>Tutorials</i>		
- <i>Coaching</i>		
- <i>PBL Course</i>		
<u>Training from a distance</u>		
- <i>Video-conferences</i>		
- <i>Webinars</i>		
<u>Self-learning</u>		
- <i>Books 'readings</i>	10	
- <i>E-learning</i>		
- <i>Research</i>		
<u>Outdoors-training</u>		
- <i>In firms</i>		
- <i>Internship</i>		
<u>Personal work</u>		
- <i>Group Projects</i>	4	
- <i>Individual Projects</i>		
- <i>Personal work</i>		
Total working time for the student	30	

3) EDUCATIONAL METHODS

Tick here the different educational methods used:

- ☐ Coaching
- ☒ Case Study
- ☐ E-Learning and/or Self-learning
- ☒ Interactive courses
- ☒ Presentations
- ☐ Projects
- ☒ Research
- ☐ Seminars
- ☐ Tutorials

☐ Visits

4) ASSESSMENT

Sum up briefly the course assessment's mechanism (*two or three lines*) in order to introduce the assessment's table that you have to complete below (table n°2).

You must also define clearly how feedback will be given to students (in accordance with the feedback policy).

Students will be assessed via classroom participation, a written final exam, and a group project.

List the assessment for each modality.

TABLE 2

Modality	Type of control	Length (h)	Number	Weighting (%)
<u>Continuous assessment</u>	Continuous assessment			
	Mid-term exam			
	Participation	14		25
	Oral presentation			
	MCQ			
<u>Final exam</u>	Oral final exam			
	Written final exam	1		30
<u>Others</u>	Case study			
	Group Project	6		45
	Individual Project			
	Written assignment			
	Exercises			
Total		21		100%

5) RECOMMENDED READING

Name of books (*indicate only three or four must-read references*) / Name of reviews:

Reference book (appellation reserved for books selected by the School and necessarily bought by all the students):

Class books :

The Little Book of Common Sense Investing by John C. Bogle

Stocks for the long run by Jeremy J. Siegel

Investing in stocks – A primer by Antonio Figueiredo

Reviews :

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Internet Resources:

Please indicate here if you use the school intranet site to put on-line documents and/or if you advise the visit of web sites to students.

Name of the Website	URL
Yahoo Finance	finance.yahoo.com
Morningstar	www.morningstar.com
Marketwatch	www.marketwatch.com
Financial Visualizations	www.finviz.com