



SUBJECT DATASHEET

RÉSZVÉNYPIACI BEFEKTETÉSEK

BMEGT35A120

I. SUBJECT DESCRIPTION

1. SUBJECT DATA

Subject name

RÉSZVÉNYPIACI BEFEKTETÉSEK

ID (subject code)

BMEGT35A120

Type of subject

contact lessons

Course types and lessons

<i>Type</i>	<i>Lessons</i>
Lecture	2
Practice	2
Laboratory	0

Type of assessment

exam grade

Number of credits

5

Subject Coordinator

<i>Name</i>	<i>Position</i>	<i>Contact details</i>
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Educational organisational unit for the subject

Department of Finance

Subject website

<https://edu.gtk.bme.hu>

Language of the subject

Magyar és angol - HU and EN

Curricular role of the subject, recommended number of terms

Programme: **Finance and Accounting Bachelor's Programme from 2019/20/Term 1**

Subject Role: **Compulsory for the specialisation**

Recommended semester: **5**

Direct prerequisites

Strong None

Weak None

Parallel None

Exclusion None

Validity of the Subject Description

Approved by the Faculty Board of Faculty of Economic and Social Sciences, Decree No: 581046/15/2021. Valid from: 24.11.2021.

2. OBJECTIVES AND LEARNING OUTCOMES

Objectives

The course's main goal is to familiarize the students with the operating mechanisms of equity markets, stock exchanges, the main market institutions, indices, the basics of equity analysis and the main portfolio-management strategies. During the semester the main emphasis will be on the fundamental analysis of equities. The course covers mainly the content of the modul VI. of the CFA (Chartered Financial Analyst) exam.

Academic results

Knowledge

1. The students are aware of
2. 1. the main concepts of equity markets,
3. 2. the context and most important theories of equity markets,
4. 3. the main methods of equity analysis,
5. 4. the main strategies of portfolio management

Skills

1. The students are able to
2. 1. plan and organize independent learning,
3. 2. comprehend and use the professional literature of the topic,
4. 3. grasp the professional language in writing and speech,
5. 4. recognize and solve practical professional problems.

Attitude

1. The students
2. 1. are open to learn and adapt the methodology of equity investments,
3. 2. collaborate with their instructors and fellow students during the learning process,
4. 3. gain knowledge and information,
5. 4. are open to critical thinking.

Independence and responsibility

1. The students
2. 1. are open to accept reliable critical remarks,
3. 2. are able to solve practical professional problems independently

Teaching methodology

Lectures and written communication, use of ICT tools and techniques.

Materials supporting learning

- Kötelező:
- 1. Az előadások prezentációinak anyaga, ami a félév során folyamatosan fog feltöltésre kerülni.
- Ajánlott::
- 2. Bodie - Kane - Marcus: Investments (10th edition), McGraw-Hill, 2014.
- 3. Brealey, R. - Myers, C.S. - Allen, F.: Principles of Corporate Finance, McGraw-Hill, 2008.

II. SUBJECT REQUIREMENTS

TESTING AND ASSESSMENT OF LEARNING PERFORMANCE

General Rules

Assessment of the previously described learning outcomes is based on one written end-term test.

Performance assessment methods

Detailed description of performance evaluations during the Semester: practice during the lectures, only for the signature, but this is not included in the final evaluation. B. Detailed description of end-term assesment: Written Exam: 90 minutes, 100 points. The test consists of mostly calculations and some definitions.

Percentage of performance assessments, conducted during the study period, within the rating

Percentage of exam elements within the rating

- Vizsga (írásbeli) : 100

Conditions for obtaining a signature, validity of the signature

The condition for obtaining the signature is the preparation of the mid-year class assignments. The condition for writing the exam is to obtain a signature. The obtained signature is valid for the period according to the TVSZ.

Issuing grades

Excellent	91 - 100
Very good	80 - 90
Good	70 - 79
Satisfactory	60 - 69
Pass	40 - 59
Fail	0 - 39

Retake and late completion

Re-taking the exam during the exam-period.

Coursework required for the completion of the subject

2 óra alkalmanként 28
94 1

Approval and validity of subject requirements

Consulted with the Faculty Student Representative Committee, approved by the Vice Dean for Education, valid from: 08.11.2021.

III. COURSE CURRICULUM

THEMATIC UNITS AND FURTHER DETAILS

Topics covered during the term

Subject includes the topics detailed in the course syllabus to ensure learning outcomes listed under 2.2. can be achieved. Timing of the topics may be affected by calendar or other circumstances in each semester.

- 1 1. Introduction to the course
- 2 2. Structures and functions of financial institutions, macrofinances, financial markets
- 3 3. Equity Markets: Characteristics, Institutions and Benchmarks, Types and characteristics of Equity Securities.
- 4 4. Equity Market Investments and Risks, Market Valuation and Return Analysis, CAPM etc.
- 5 5. Behavioral Finance and Technical Analysis
- 6 6. Fundamental Analysis (Macro, Industry) I.
- 7 7. Fundamental Analysis (Company) II.
- 8 8. Fundamental Analysis (Company) III.
- 9 9. Equity Portfolio Management Strategies and Performance Analysis 1.
- 10 10. Equity Portfolio Management Strategies and Performance Analysis 2.
- 11 11. Bonds, FX markets, forwards, futures, swaps, options etc.
- 12 12. Stock market crises
- 13 13. Practice of the Calculations, Consultation
- 14 14. Practice of the Calculations, Consultation
- 15 15. Buffer Week

Additional lecturers

Approval and validity of subject requirements