

# SUBJECT DATASHEET RÉSZVÉNYPIACI BEFEKTETÉSEK BMEGT35A120

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# I. SUBJECT DESCRIPTION

# 1. SUBJECT DATA

#### Subject name

RÉSZVÉNYPIACI BEFEKTETÉSEK

ID (subject code) BMEGT35A120

Type of subject

contact lessons

Course types and lessons		Type of
Type	Lessons	<u>assessment</u>
Lecture	2	exam grade
Practice	2	Number of
Laboratory	0	<u>credits</u> 5

# **Subject Coordinator**

Name Position Contact details

Póra András assistant lecturer pora.andras@gtk.bme.hu

#### 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 NoneWeak NoneParallel NoneExclusion 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.

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# 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.
- A jánlott::
- 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 assessment: 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

# 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.

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# 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 achi- eved. 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
- 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

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