

DESCRIPTION OF STUDY COURSE

Course unit title	Investment Management		
Programme	Business Administration		
Year of study	1st		
Level of course unit (e.g. first, second or third cycle)	Master's study program		
Course unit code	MV017		
Name of lecturer(s)	Ilja Arefjevs		
Number of ECTS credits allocated (1KP = 1,5ECTS)	3ECTS		
Credit points	2 CP, Latvian credit points are multiplied by 1,5 to get ECTS credit points		
Language of instruction	Latvian		
Type of course unit (compulsory, optional)	Optional Study Course		
Semester when the course unit is delivered	2nd		
Mode of delivery	Face-to face		
Aim of Course	To improve knowledge in the field of company's financial management. Evaluate the company's financial position and development prospects, make informed strategic investment decisions, diversify the risks of the financial instruments' portfolio.		
Preliminary knowledge (prerequisites and co-requisites)	Financial Management, Business Management Accounting, Financial Analysis, Corporate Finance, Knowledge of foreign languages		
Course contents	<ol style="list-style-type: none"> 1. Nature of financial market instruments and types of analysis. Underlying financial market instruments: public equity, fixed income securities. 2. Issuers of shares and debt securities. 3. Factors influencing the price of shares and debt securities. 4. Types of analysis of shares and debt securities. Checklist of basic facts. 5. Investment strategy and tactics, their types, and properties. 6. The role of information in the financial market. Types of information, sources, and methods of analysis. 7. The role of macroeconomic factors in the financial market. 8. Financial instruments portfolio diversification techniques. 9. Main indicators and trends of the world financial market. 		
Planned learning activities	<p>The student attends lectures, participates in seminars, performs independent work.</p> <p>The total assessment for the acquisition of the study course consists of 50% of the independent work performed during the study process, 50% of the examination assessment at the end of the study course.</p>		
Planned teaching methods	Teaching methods	Student workload	
		Full-time	distance learning
	Lectures	7.5%	10%
	Seminars	2.5%	-
Practical works	10%	10%	

	Preparation and presentation of the independent work	50%	40%	
	Work at the library, independent studies	30%	40%	
		Total 80 hours		
Learning outcomes of the course unit	<ol style="list-style-type: none"> 1. Understands the principles and methods of operation of financial market instruments. 2. Is able to formulate strategic and tactical investment decisions. 3. Able to assess the risks of financial instrument portfolios, diversify them. 			
Methods and criteria for assessment of learning results	Learning outcomes	1.	2.	3.
	Form of assessment			
	Written individual work		●	●
	Group work in the auditorium	●	●	●
	Written exam	●	●	●
Recommended or required reading	<p>Required reading:</p> <ol style="list-style-type: none"> 1. Benjamin Graham. The Intelligent Investor: The Classic Text on Value Investing (Reprint of 1949 Edition). USA: HarperBusiness, 2005. ISBN 978-0060752613 2. Jim Collins. Good to Great: Why Some Companies Make the Leap...And Others Don't. USA: HarperBusiness (1st edition), 2001. ISBN 978-0066620992 3. Zvi Bodie, Investments / Zvi Bodie, Alex Kane, Alan J. Marcus. 10th edition, Berkshire, UK: McGraw-Hill Education, 2014. ISBN 978-0077161149. <p>Recommended reading:</p> <ol style="list-style-type: none"> 1. Richard A. Brealey, Fundamentals of corporate finance 8th edition. McGraw-Hill international edition New York: McGraw-Hill Education, 2015. ISBN 978-9814670944 2. Howard Schilit, Jeremy Perler. Financial Shenanigans: How to Detect Accounting Gimmicks & Fraud in Financial Reports. USA: McGraw-Hill Education (3rd edition), 2010. ISBN 978-0071703079 3. Olivier Blanchard, Macroeconomics. USA: Pearson (6th edition), 2012. ISBN 978-0133061635 4. Peter Lynch, One Up On Wall Street: How To Use What You Already Know To Make Money In The Market. USA: Simon & Schuster (2nd edition), 2000. ISBN 978-0743200400 5. Thornton L. O'glove. Quality of Earnings. USA: Free Press, 1998. ISBN 978-0684863757 			