

# Course title: Fundamental and Technical Analysis

Studies: International Business

## Course description form (syllabus form)

General data						
Cycle of studies	2024-2027					
Organizational unit	Faculty of Economic Sciences					
Studies	International Business, first-cycle studies					
The profile of education	general academic					
Semester	06					
Mode of studies	full-time					
Type of course	Lecture	Practical session	Laboratory	Conversatorium	Seminar	Project
Number of hours	15		30			
Number of ECTS	4					
Examination	Graded credit					
Language	English					
Content author	PhD Agnieszka Moskal					
Course objectives						
The aim of the course is to provide students with knowledge in fundamental and technical analysis. It involves acquainting them with principles, issues, and methodologies used in conducting financial market analysis. The goal is to prepare students for independent and responsible investment decision-making.						
Prerequisites						
Participants should know and understand basic concepts of financial markets, statistical data analysis, and financial analysis.						
Student workload						
1. Class sessions- 45 hours 2. Reading literature for classes - 18 hours 3. Solving problems/tasks - 15 hours 4. Assessment preparation - 20 hours 5. Consultation – 2 hours  TOTAL: 100 hours (4 ECTS)						
Short description						
Principles of fundamental and technical analysis. Equity market indicators. Creating stock charts. Trend analysis. Moving averages and their application in technical analysis. Popular price indicators and oscillators. Fundamental analysis and company valuation						
Learning outcomes						
KNOWLEDGE: W01. Participants know and understand the role of fundamental and technical analysis as important techniques in capital market analysis (IB1_W02) W02. Participants know and understand the methodologies and data sources used in fundamental and technical analysis. (IB1_W04) SKILLS: U01. Participants are able to acquire, assess, and utilize information necessary for fundamental and technical analysis. (IB1_U01) U02. Participants are able to utilize computer tools for fundamental and technical analysis.(IB1_U03) COMPETENCIES: K01. Participants are ready to work in groups on case studies during the course. (IB1_K02) K02. Participants are ready to independently supplement and enhance the acquired knowledge and skills in the field of financial markets. (IB1_K01)						
Form of verification						
Lectures: Graded credit. Written test (one-choice questions, true/false questions, fill-in-the-blank questions). Class exercises: Graded credit. Group project, problem-solving, individual and group activity assessed during classes.						
Detailed data						
<b>Type of course:</b> Lecture: Graded credit. Class exercises: Graded credit.						
Bibliography						
<b>Bibliography:</b> 1. R. D. Edwards, J. Magee, W.H.C. Bassetti, Technical analysis of stock trends, CRC press, 2018. 2. E. Schuler, Fundamental Analysis, Zoe Lawson 2022. <b>Supplementary:</b> 1. X. Yan, L.Zheng, Fundamental analysis and the cross-section of stock returns: A data-mining approach, The Review of Financial Studies 30.4 (2017), s. 1382-1423. 2. A. S. Wafi, H. Hassan, A. Mabrouk, Fundamental analysis models in financial markets–review study, Procedia economics and finance 30 (2015), s. 939-947. 3. Q. Lin, Technical analysis and stock return predictability: An aligned approach, Journal of financial markets 38 (2018), s. 103-123.						
Range of content						

**Lecture**

- 1) Principles of fundamental and technical analysis.
- 2) Equity market indicators.
- 3) Creating stock charts.
- 4) Trend analysis.
- 5) Moving averages and their application in technical analysis.
- 6) Popular price indicators and oscillators.
- 7) Fundamental analysis and company valuation.

**Class exercises**

- 1) Equity market indicators – case study.
- 2) Creating stock charts – case study.
- 3) Trend analysis – case study.
- 4) Moving averages and their application in technical analysis - case study.
- 5) Popular price indicators and oscillators - case study.
- 6) Fundamental analysis and company valuation - case study.
- 7) Review and passing exercises.

**Didactic methods****Lecture**

1. Lecture with the use of audiovisual aids.
2. Individual study with literature.
3. Group discussion.

**Class exercises**

1. Outlines covering topics discussed during exercises.
2. Individual study with literature.
3. Discussion and group work.
4. Presentation of discussed topics using supporting tools (multimedia presentation).
5. Problem-solving.
6. Group project.

In case of the necessity for remote sessions - the possibility of using Microsoft Teams program.

**Assessment methods and assessment criteria****Lecture:**

1. Written test. (W01, W02)

Grading scale: 60% = 3.0; 95% = 5.0.

Online exam is allowed in case of necessity to conduct classes remotely.

**Class exercises:**

1. Observation and evaluation of activity. (U01, U02, K01, K02)
2. Problem solving and case studies. (W01, W02, U01, U02, K01, K02)
3. Group project. (W01, W02, U01, U02, K01, K02)

The final grade is determined by the sum of points for: group project, individual and group activity in class.

Grading scale: 60% = 3.0; 95% = 5.0.

In the event of the necessity for remote form, tests will be conducted using the testportal platform. In case of retake, passing the retake test covering topics from the entire course is required, with the maximum grade for retake being 3.5.