

## Liverpool John Moores University

Title: Investment and Financial Analysis  
Status: Definitive  
Code: **5016LBSBSC** (126335)  
Version Start Date: 01-08-2021

Owning School/Faculty: Business and Management  
Teaching School/Faculty: Business and Management

Team	Leader
Karl Harper	Y

**Academic Level:** FHEQ5      **Credit Value:** 20      **Total Delivered Hours:** 44  
**Total Learning Hours:** 200      **Private Study:** 156

### Delivery Options

Course typically offered: Semester 2

Component	Contact Hours
Lecture	11
Workshop	33

**Grading Basis:** 40 %

### Assessment Details

Category	Short Description	Description	Weighting (%)	Exam Duration
Portfolio	Port	Portfolio to include presentation and report	100	

### Aims

*To enable students/business managers of the future to:*

- *make evidence-based investment decisions and*
- *analyse financial statements and performance in order to ensure sustainability, liquidity and profitability*

## Learning Outcomes

After completing the module the student should be able to:

- 1 Analyse the estimated Risk and Return of investments using a range of statistical methods in order to recommend evidence-based investment decisions.
- 2 Explain the implications of the Efficient Markets Hypothesis on investment decisions.
- 3 Examine financial statements and performance in order to ensure sustainability, liquidity and profitability.
- 4 Evaluate a business as a going and gone concern and recommend plans to restructure the capital in order to avoid liquidation.

## Learning Outcomes of Assessments

The assessment item list is assessed via the learning outcomes listed:

Portfolio	1	2	3	4
-----------	---	---	---	---

## Outline Syllabus

- *The Financial Objectives of the Firm.*
- *The Criteria for Investment Decisions*
- *Physical & Financial Investments*
- *Leasing*
- *Risk & Return*
- *Calculating Risk – Beta, Standard Deviation*
- *Portfolio Theory – Correlation & Covariance*
- *Tax Management*
- *The Efficient Market Hypothesis*
- *Financial Statements Analysis: Profitability, Liquidity, Capital Adequacy*
- *Cash Flow & Working Capital Management*
- *Liquidation & Capital Restructure*

## Learning Activities

Formal lectures and workshops.

## Notes

The critically evaluation of invest net decisions and the analysis of financial performance.