

Liverpool John Moores University

Title: Investment and Financial Analysis
Status: Definitive
Code: **5716SERCBM** (128221)
Version Start Date: 01-08-2021

Owning School/Faculty: Business and Management
Teaching School/Faculty: South Eastern Regional College

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
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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.