

DESCRIPTION OF THE COURSE OF STUDY

Course code	0412-4FiR-B/C20-A4	
Name of the course in	Polish	MENEDŻERSKA ANALIZA FINANSOWA
	English	MANAGERIAL FINANCIAL ANALYSIS

1. LOCATION OF THE COURSE OF STUDY WITHIN THE SYSTEM OF STUDIES

1.1. Field of study	FINANCE AND ACCOUNTING
1.2. Mode of study	Full Time / Part Time
1.3. Level of study	I degree (Bachelor's Degree)
1.4. Profile of study*	Practical
1.5. Person/s preparing the course description	Prof. UJK dr hab. Barbara Zbroińska
1.6. Contact	b.zbroińska@ujk.edu.pl

2. GENERAL CHARACTERISTICS OF THE COURSE OF STUDY

2.1. Language of instruction	English
2.2. Prerequisites*	Accounting, Business Law, Corporate Financial Management

3. DETAILED CHARACTERISTICS OF THE COURSE OF STUDY

3.1. Form of classes	lectures, classes	
3.2. Place of classes	Lectures at university	
3.3. Form of assessment	Exam/graded credit	
3.4. Teaching methods	Problem-based lecture; Case analysis; Situational method; Subject exercises	
3.5. Bibliography	Required reading	Sierpińska M., T. Jachna, Ocena przedsiębiorstwa wg standardów światowych, Warszawa: Wydawnictwo Naukowe PWN 2017 Nowak E., Analiza sprawozdań finansowych, Warszawa: PWE 2017.
	Further reading	Brigham, E. F. Erhard M., Financial Management: Theory and Practice, South-Western Cengage Learning, 2013.

4. OBJECTIVES, SYLLABUS CONTENT AND INTENDED LEARNING OUTCOMES

<p>4.1. Course objectives (including form of classes)</p> <p>C1. Knowledge – understanding the tools of financial analysis and how to use financial statements to assess a company's condition and make decisions.</p> <p>C2. Skills – evaluating the asset and capital situation, financial liquidity, indebtedness, asset utilization, and profitability using ratio analysis, as well as identifying risks to business continuity.</p> <p>C3. Competencies – preparing to work in a company by supporting management in decision-making processes through financial ratio analysis. Recognizing opportunities and threats in the immediate and broader environment.</p>
<p>4.2. Detailed syllabus (including form of classes)</p> <p>Lecture: 1. Usefulness of information in managerial decision-making 2. Financial analysis tools 3. Preliminary analysis of the balance sheet and profit and loss statement 4. Financial effects of asset and capital structure. Operational and financial risk 5. Factor analysis of financial results. Assessment of the market situation 6. Evaluation of a company's condition using ratio analysis. Possibilities and limitations. Methods for assessing bankruptcy risk.</p> <p>Classes:</p> <ol style="list-style-type: none"> 1. financial analysis tools, 2. principles for presenting analysis results (tables, charts), 3. ratio analysis, 4. evaluation of investment projects, 5. measuring efficiency, identifying a company's development method (extensive/intensive). <p>4.3. Subject-related</p>

4.3 Intended learning outcomes

Code	A student, who passed the course	Relation to learning outcomes
within the scope of KNOWLEDGE:		
...W01	Student knows the micro and macroeconomic phenomena of a market economy.	FiR1P_W01 FiR1P_W02
W02	Student has knowledge in finance and accounting and knows how to use it in business management	FiR1P_W01 FiR1P_W02
W03	Knows the sources and methods of measuring risk in a business. Recognizes opportunities and	FiR1P_W04

	threats in the business environment.	
W04	Student knows the quantitative and qualitative methods used in the financial assessment of a company. He/she knows how to obtain data for financial analysis. He/she understands the informational value of the data contained in financial statements.	FiR1P_W06 FiR1P_W07
within the scope of ABILITIES:		
U01	Can identify financial phenomena in a company and its environment	FiR1P_U01
U02	The student uses the financial statement to analyse financial processes and phenomena in the company	FiR1P_U03
U03	Student is able to prepare a ratio analysis and assess the company's condition based on it, as well as identify areas of risk and potential bankruptcy.	FiR1P_U05 FiR1P_U06
U04	Uses a foreign language at the B2 level of the Common European Framework of Reference for Languages	FiR1P_U12
U05	Student uses IT tools applied in finance and accounting	FiR1P_U13
within the scope of SOCIAL COMPETENCE:		
...K01	Student is aware of the risks of running a business and the consequences of making decisions	FiR1P_K02
K02	Student recognizes the professional dilemmas in the field of finance and accounting	FiR1P_K03
K03	Student is aware of the need to continuously update his knowledge, especially regarding changes in legal regulations.	FiR1P_K05
K04	Student is entrepreneurial and actively participates in economic projects	FiR1P_K06

4.4. Methods of assessment of the intended learning outcomes

Teaching outcomes (code)	Method of assessment (+/-)																							
	Exam oral/written*			Test*			Project*			Effort in class*			Self-study*			Group work*			Others* Presentation of the economic issue					
	Form of classes			Form of classes			Form of classes			Form of classes			Form of classes			Form of classes			Form of classes					
	L	C	...	L	C	...	L	C	...	L	C	...	L	C	...	L	C	...	L	C	...			
...W01	+														+									
W02	+				+							+			+									
W03	+				+							+			+									
W04	+				+							+			+									
...U01		+			+							+												
U02		+			+							+												
U03	+	+			+							+					+							
U04																								
U05															+									
...K01												+												
K02												+												
K03												+												
K04															+									

*delete as appropriate

4.5. Criteria of assessment of the intended learning outcomes

Form of classes	Grade	Criterion of assessment
lecture (L)	3	Achieving from 50% to 59% of the maximum possible points
	3,5	Achieving from 60% to 69% of the maximum possible points
	4	Achieving 70% to 79% of the maximum possible score
	4,5	Achieving from 80% to 89% of the maximum possible points
	5	Achieving from 90% to 100% of the maximum possible points
classes (C)*	3	Achieving from 50% to 59% of the maximum possible points
	3,5	Achieving from 60% to 69% of the maximum possible points

	4	Achieving 70% to 79% of the maximum possible score
	4,5	Achieving from 80% to 89% of the maximum possible points
	5	Achieving from 90% to 100% of the maximum possible points

11. BALANCE OF ECTS CREDITS – STUDENT’S WORK INPUT

Category	Student's workload	
	Full-time studies	Extramural studies
<i>NUMBER OF HOURS WITH THE DIRECT PARTICIPATION OF THE TEACHER /CONTACT HOURS/</i>	45	25
<i>Participation in lectures*</i>	15	10
<i>Participation in classes, seminars, laboratories*</i>	30	15
<i>Preparation in the exam/ final test*</i>		
<i>Others (please specify e.g. e-learning)*</i>		
<i>INDEPENDENT WORK OF THE STUDENT/NON-CONTACT HOURS/</i>	30	50
<i>Preparation for the lecture*</i>	5	10
<i>Preparation for the classes, seminars, laboratories*</i>	10	20
<i>Preparation for the exam/test*</i>	15	20
<i>Gathering materials for the project/Internet query*</i>		
<i>Preparation of multimedia presentation</i>		
<i>Others *</i>		
<i>TOTAL NUMBER OF HOURS</i>	75	75
ECTS credits for the course of study	3	3

**delete as appropriate*

Accepted for execution (date and legible signatures of the teachers running the course in the given academic year)

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