Institute of Technology Tallaght
Institiúid Teicneolaíochta Tamhlacht

RANA H3001: Investor Research and Analysis Extra Header Data

Short Title:	Investor Research and Analysis APPROVED
Full Title:	Investor Research and Analysis

Module Code:	RANA H3001	**NFQ Level:**	7	**ECTS Credits:**	5

Reviewed By:	MARTIN NOLAN

Description:	Module Aims: This module aims to develop in student's a knowledge and understanding of the mechanisms of security markets. It also aims to familiarise students with current and potential future developments in security regulation on both national and international levels. The module aims to equip students to use research methodologies to calculate, evaluate and present financial information. It also equips students to identify and evaluate the factors, which affect the performance of securities.

Learning Outcomes:

On successful completion of this module the learner will be able to

1. Identify and critically evaluate the different types of securities.
2. Display the detailed analytical skills essential to analysing each type of financial security
3. Discuss and assess European and US security market regulation.
4. Evaluate and explain the key challenges in managing securities.
5. Design and implement a methodology for conducting research and analysis on investment securities
6. Display a detailed practical knowledge of the futures and options markets.

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Module Content & Assessment

Content
Securities Markets: (10%) The role of the major securities markets and the detailed operation of the bond, equity, derivative, and currency markets. The range of security market products and services offered by financial institutions **Securities Regulation: (10%)** The major body of law that governs the securities industry in Europe and the US. Comprehend the laws governing registration of securities, corporate reporting, investment companies, and investment advisors. Regulation on investment limits and types of investments permitted in funds. **Investment Analysis: (20%)** Portfolio planning, arbitrage opportunities and understanding the role and process of investment research and analysis, research methodology, sources of research analysis, an understanding of the role of client relationship management and portfolio management. **Investment Analysis of Bond Markets: (10%)** Critical factors affecting bond prices and yield curves, The relationship between coupon rates and the pricing of bonds, convertible prices, credit sensitiveness, accrued interest, redemption yields, credit spread, call dates, new issues and managing bond portfolios. **Investment Analysis of Equity Markets: (20%)** Critical factors affecting stock prices, building on earlier studies on fundamental analysis and an in-depth analysis and application of investment ratios. The applications of technical analysis in the equity markets, identifying sources of research, implications of efficient market theory, types of share price information, analysing different market trends, market psychology, share dealing and the operations of equity fund management. **Investment Analysis of Derivative Markets: (10%)** Sources of research for derivative markets. The design and operation of interest rate option positions and swaps. The operation of commodity market trading. **Investment Analysis of Currency Markets: (10%)** Critical factors affecting currency markets, The major currencies and currency trends, currency spreads, types of orders, rollovers, interest policies, The operations of risk management, The role of forward and future contracts and sources of currency market research. The applications of technical analysis for the currency markets and the use and validity of currency forecasting models **Investor Research Techniques; (10%)** Identifying and classifying data, examining sampling techniques, evaluation of data statistics. The use of regression analysis and “goodness of fit” in data collection and application, The use of data to forecast the interrelationship between variables, presentation of data results in a form suitable for publication.

Assessment Breakdown	%
Course Work	40%
End of Semester Formal Examination	60%

	Outcome addressed	*% of total*	*Assessment Date*
Formal End-of-Semester Examination	1,2,3,4,5,6	60%	Semester End

Coursework Breakdown				
Type	*Description*	*Outcome addressed*	*% of total*	*Assessment Date*
Continuous Assessment	30% of the continuous assessment will be in the form of a shared assessment is between module 5.3 Investor Research and 5.1 Financial Reporting & Analysis		40	n/a

IT Tallaght reserves the right to alter the nature and timings of assessment

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Module Workload & Resources

This course has no full time workload.

Resources
Required Book Resources
Timothy Hayes, *The Research Driven Investor: How to Use Information, Data and Analysis for Investment Success by Timothy Hayes*, Timothy Hayes **Benjamin Graham, *The Intelligent Investor – the Classic Text on Value Investing*, Harper Business Publishers.** **Martin J. Pring., *Technical Analysis Explained : The Successful Investor's Guide to Spotting Investment Trends and Turning Point***