



INTERNATIONAL SUMMER SCHOOL 2023

SYLLABUS

Academic year 2022/2023



International Summer School 2023

Academic and language requirements

Courses are open to Undergraduate and Graduate students providing that applicants have the **pre-requisites** specified in the course's syllabus.

Courses are taught and assessed in English. For non-native speakers of English, B2 (CEFR) or equivalent (TOEFL IBT 72, IELTS 5.0, TOEIC 750) is highly recommended.

Additional information

For details about study programmes offered by EM Normandie please contact:

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COURSE TITLE	Fundamentals of Investing and Trading in the Stock Market		
	<i>"Rule #1: Never Lose Money. Rule #2: Never Forget Rule #1" (Warren Buffet)</i>		
Session and Campus	Session 1, LE HAVRE		
Teaching delivery	On campus, attendance mandatory		
Workload (1h = 60 min)	30 class-hours + Independent learning hours	ECTS credits	6
Professors	Charbel SALLOUM, HDR, Ph.D., csalloum@em-normandie.fr Associate Professor		
Pre-requisite(s) for attending the course	N/A		
Learning goal(s)	<ul style="list-style-type: none"> ▪ LG1: To be equipped with efficient business skills ▪ LG2: To be entrepreneurially minded ▪ LG4: To be a project manager with a strategic overview 		
Learning objective(s)	<ul style="list-style-type: none"> ▪ LG1/LO1: To apply appropriate financial skills ▪ LG2/LO4: To improve leadership skills ▪ LG4/LO3: To do a global analysis of the firm in its environment <p>By the end of this course, participants are able to:</p> <ul style="list-style-type: none"> ▪ Understand the characteristics of different financial assets and how to trade these assets ▪ Understand the benefit of diversification of holding a portfolio of assets ▪ Evaluate the risk and return ▪ Manage a financial portfolio 		
Learning outcome(s)	<ul style="list-style-type: none"> ▪ LG1/LO1/I1: To realize a financial analysis ▪ LG2/LO4/I2: To exercise critical thinking ▪ LG4/LO3/I2: To distinguish between what is a strategic situation and what is not <p>By the end of this course, participants are able to:</p> <ul style="list-style-type: none"> ▪ Describe characteristics of equity investments, security markets, and indexes. ▪ Analyze the market and equity securities to compose and suggest recommendations ▪ Describe key attributes and considerations in managing these investments in a portfolio 		
Course description	<p>Contents: This course provides a structural overview of financial markets and their operating characteristics. Various asset types, market participants, and how assets trade within these markets and ecosystems are also described. Furthermore, this course is designed to familiarize students with the principles of a portfolio management of equity securities. It focuses on the risk-return relationship and focus on the fundamental and technical analysis of stocks. The concepts of trading mechanisms and market techniques will be addressed with a simulation trading competition.</p> <p>1: The Market Environment and Securities - This module focuses on the following topics:</p> <ul style="list-style-type: none"> ▪ Bonds, Stocks and other Financial Securities ▪ Security Markets ▪ Practical Case and Simulation ▪ Bonds and Stocks Trading ▪ Case Studies and Portfolio Management Competition 		

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	<p>2: Risk Reduction and Diversification - This module focuses on the following topics:</p> <ul style="list-style-type: none"> ▪ Risk Reduction ▪ Diversification ▪ Common Stock: Valuation ▪ Case Studies and Portfolio Management Competition <p>3: Analysis and Trading - This module focuses on the following topics:</p> <ul style="list-style-type: none"> ▪ Market and Industry Analysis ▪ Fundamental Analysis ▪ Technical Analysis ▪ Case Studies and Portfolio Management Competition <p>Each module will use the following types of activities and teaching methods:</p> <ul style="list-style-type: none"> ▪ Interactive presentations with reflection points and discussions ▪ Case study ▪ Tutorial and team exercises using financial data <p>Methods: Course lecture; Case studies; Project; Simulation</p>		
<p>Teaching Material</p>	<ul style="list-style-type: none"> ▪ PowerPoint: Up-Ward ▪ eBooks: Up-Ward ▪ Case Studies: REFINITIV Eikon ▪ Competition: Trading Simulation ▪ Educational Videos: <ul style="list-style-type: none"> ▪ Explaining Inflation ▪ Interests Rates ▪ Time Value of Money ▪ The Stock Market ▪ Market Cap ▪ Dividends ▪ What is a Bond? ▪ Stock Market Index ▪ What is an IPO? <ul style="list-style-type: none"> ▪ Buying on Margin Basics ▪ Order Types ▪ Short Selling ▪ How to Build a Portfolio? ▪ Income Statements ▪ Balance Sheet ▪ Cash Flow Statement ▪ What is a P/E Ratio? ▪ Fundamental and Technical Analysis <p>Movies:</p> <ul style="list-style-type: none"> ▪ Movie 1: Inside Job (2010) ▪ Movie 2: The Wolf of Wall Street (2013) ▪ Movie 3: Wall Street: Money Never Sleeps (2010) 		
<p>Evaluation criteria</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;"> <p>Continuous assessment: 40%</p> <p>- Please precise type and conditions of exam</p> </td> <td style="width: 50%; padding: 5px;"> <p>Final assessment:60%</p> <p>- Please precise type and conditions of exam</p> </td> </tr> </table>	<p>Continuous assessment: 40%</p> <p>- Please precise type and conditions of exam</p>	<p>Final assessment:60%</p> <p>- Please precise type and conditions of exam</p>
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<p>Recommended readings</p>	<p>Consult teaching materials (will be accessible on Up-Ward platform during class period) as well as:</p> <ul style="list-style-type: none"> ▪ Levy, H., & Post, T. (2005). Investments. Pearson Education (Up-Ward) ▪ Pring, M. J. (2015). Martin Pring's Introduction to Technical Analysis. McGraw Hill Professional (Up-Ward) ▪ Scott, B., Gitman, L., & Joehnk, M. (2017). Fundamentals of Investing, Global Edition. Pearson Education (Up-Ward) 		

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