

University of the West of Scotland Module Descriptor

Session: 2024/25

26/03/2024

Title of Module: Introduction to Investment			
Code:	SCQF Level: 8 (Scottish Credit and Qualifications Framework)	Credit Points: 20	ECTS: 10 (European Credit Transfer Scheme)
School:	School of Business & Creative Industries		
Module Co-ordinator:	Chikodi Uche-Ugwu		

Summary of Module

This module provides a comprehensive introduction to the financial services industry, with a specific focus on investments. It covers key financial principles and products in depth including assets and markets, equities, bonds, derivatives, investment funds and taxation, investment wrappers and trusts. It explores the broader economic environment in which the financial services industry operates and looks at how economic activity is determined and managed in different economic and political systems. The module ensures candidates are provided with an understanding of ethical behaviour and acting with integrity.

Emphasis is given on how these topics and theories are applied in practice considering the professional responsibilities and the career development issues associated in this field.

Module Delivery Method

Face-To-Face	Blended	Fully Online	HybridC	HybridO	Work-based Learning
✓	✓				

Face-To-Face

Term used to describe the traditional classroom environment where the students and the lecturer meet synchronously in the same room for the whole provision.

Blended

A mode of delivery of a module or a programme that involves online and face-to-face delivery of learning, teaching and assessment activities, student support and feedback. A programme may be considered "blended" if it includes a combination of face-to-face, online and blended modules. If an online programme has any compulsory face-to-face and campus elements it must be described as blended with clearly articulated delivery information to manage student expectations

Fully Online

Instruction that is solely delivered by web-based or internet-based technologies. This term is used to describe the previously used terms distance learning and e learning.

HybridC

Online with mandatory face-to-face learning on Campus

HybridO

Online with optional face-to-face learning on Campus

Work-based Learning

Learning activities where the main location for the learning experience is in the workplace.

Campus(es) for Module Delivery

The module will **normally** be offered on the following campuses / or by Distance/Online Learning: (Provided viable student numbers permit)

Paisley:	Ayr:	Dumfries:	Lanarkshire:	London:	Distance/Online Learning:	Other:
✓			✓			

Term(s) for Module Delivery

(Provided viable student numbers permit).

Term 1	✓	Term 2		Term 3	
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Learning Outcomes: (maximum of 5 statements)

On successful completion of this module the student will be able to:

L1. Demonstrate a basic understanding of stock and bond markets and various financial institutions.

L2. Demonstrate an understanding of equities, bonds, derivatives, collective investment funds and other financial assets.

L3. Explain the key elements of financial services regulation and demonstrate an understanding of financial crime, including money laundering.

L4. Explain the key direct and indirect taxes affecting individuals, tax incentives, pensions and trusts.

L5. Demonstrate knowledge about key financial products and areas of financial advice.

Employability Skills and Personal Development Planning (PDP) Skills

SCQF Headings	During completion of this module, there will be an opportunity to achieve core skills in:
Knowledge and Understanding (K and U)	SCQF Level 8. Demonstrate knowledge of the scope of the financial services sector and a discerning understating of products available within this sector, together with an awareness and understanding of risk and the importance of ethical investment.
Practice: Applied Knowledge and Understanding	SCQF Level 8. Application of knowledge and understanding of the financial services sector and products in the practical contexts and using a range of professional skills and techniques associated with financial services.
Generic Cognitive skills	SCQF Level 8. Undertake critical analysis and evaluation of information in relation to financial services products in a coherent manner and evaluate evidence-based solutions
Communication, ICT and Numeracy Skills	SCQF Level 8. Use a wide range of communication and ICT skills to convey complex information about financial products to a range of audiences for a variety of purposes.

Pre-requisites:	Before undertaking this module the student should have undertaken the following:	
	Module Code:	Module Title:
	Other:	
Co-requisites	Module Code:	Module Title:

* Indicates that module descriptor is not published.

Learning and Teaching	
This module will use a traditional lecture and tutorial format of delivery. The lectures will focus on conveying the core knowledge required to understand the key financial principles. The lectures will be supported by tailored tutorials discussion sessions, with appropriate questions to allow students to reflect on their understanding of the lecture materials and consider the practical implications of these key financial principles techniques in the workplace.	
Learning Activities During completion of this module, the learning activities undertaken to achieve the module learning outcomes are stated below:	Student Learning Hours (Normally totalling 200 hours): (Note: Learning hours include both contact hours and hours spent on other learning activities)
Lecture/Core Content Delivery	12
Tutorial/Synchronous Support Activity	24
Independent Study	164
	200 Hours Total
**Indicative Resources: (eg. Core text, journals, internet access)	
The following materials form essential underpinning for the module content and ultimately for the learning outcomes: Introduction to Investment, CISI (most recent edition) Bodie, Z. and Kane, A., 2020. Investments. McGraw-Hill	
(**N.B. Although reading lists should include current publications, students are advised (particularly for material marked with an asterisk*) to wait until the start of session for confirmation of the most up-to-date material)	
Engagement Requirements	
In line with the Academic Engagement Procedure, Students are defined as academically engaged if they are regularly engaged with timetabled teaching sessions, course-related learning resources including those in the Library and on the relevant learning platform, and complete assessments and submit these on time. Please refer to the Academic Engagement Procedure at the following link: Academic engagement procedure	

Supplemental Information

Programme Board	Accounting, Finance and Law
Assessment Results (Pass/Fail)	Yes
Subject Panel	Accounting, Finance and Law
Moderator	
External Examiner	N/A
Accreditation Details	N/A
Changes/Version Number	1

Assessment: (also refer to Assessment Outcomes Grids below)
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Professional report to client offering tailored financial advice (100%)

(N.B. (i) Assessment Outcomes Grids for the module (one for each component) can be found below which clearly demonstrate how the learning outcomes of the module will be assessed. (ii) An indicative schedule listing approximate times within the academic calendar when assessment is likely to feature will be provided within the Student Handbook.)
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Assessment Outcome Grids (Footnote A.)

Component 1							
Assessment Type (Footnote B.)	Learning Outcome (1)	Learning Outcome (2)	Learning Outcome (3)	Learning Outcome (4)	Learning Outcome (5)	Weighting (%) of Assessment Element	Timetabled Contact Hours
Video Presentation	✓	✓				50	

Component 2							
Assessment Type (Footnote B.)	Learning Outcome (1)	Learning Outcome (2)	Learning Outcome (3)	Learning Outcome (4)	Learning Outcome (5)	Weighting (%) of Assessment Element	Timetabled Contact Hours
Report to client with tailored financial advice			✓	✓	✓	50	

Combined Total For All Components	100%	
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Footnotes

A. Referred to within Assessment Section above

B. Identified in the Learning Outcome Section above

Note(s):

1. More than one assessment method can be used to assess individual learning outcomes.
2. Schools are responsible for determining student contact hours. Please refer to University Policy on contact hours (extract contained within section 10 of the Module Descriptor guidance note).
This will normally be variable across Schools, dependent on Programmes &/or Professional requirements.

Equality and Diversity

This module is inclusive and suitable for all students, regardless of ethnic background, disability, age, gender, religious belief, or sexual orientation. The University offers facilities and resources for all students through the Enabling Support Team.

[UWS Equality and Diversity Policy](#)

(N.B. Every effort will be made by the University to accommodate any equality and diversity issues brought to the attention of the School)