

Assessment Brief

Submission and feedback dates

Submission deadline: Between 15th July and 26th July. You will be allocated a specific time slot between these dates.

This assessment is **not** eligible for 48-hour late submission window.

Marks and Feedback due: 20 working days after the date of the Critical discussion.

N.B. all times are 24-hour clock, current local time (at time of submission) in the UK.

Submission details

Module title and code: UMADXE-45-M Project – Finance and Investment

Assessment type: Project

Assessment title: Portfolio submission and critical discussion

Assessment weighting: 60% of total module mark

Size or length of assessment: 20-minute discussion of portfolio

Module learning outcomes assessed by this task:

1. Demonstrate an ethical approach to project management to plan and execute a significant piece of independent research in the field of accounting and finance.
2. Communicate and defend conclusions using a variety of formats.
3. Critically discuss and appraise current and core issues in the relevant literature.
4. Identify, apply and defend meaningful choices in relation to methodology and data.
5. Evidence deep understanding of, and ability to reflect critically on, chosen research approach, process and feedback.

Completing your assessment

What am I required to do on this assessment?

Throughout teaching blocks 2 and 3, you will submit four pieces of work relating to your research project, which will build into a portfolio. This assessment requires you to discuss your project with two examiners. The examiners will have access to your portfolio during the critical discussion, which will take place on campus.

Where should I start?

You should be familiar with the analytical frameworks provided in the Financial Statement Analysis module of Semester 1. Book an appointment with your mentor and try to familiarize yourself with the tasks included in the portfolio.

You will submit four portfolio tasks:

1. Outline of two selected companies and aims of the project by 22nd March 2024
Please explain your choice of the two companies and/or their industry. Give a brief description of your selected companies and briefly explain the aims of your project. Use UWE-Harvard style referencing. (500 words, excluding references).
2. The macro environment by 26th April 2024
In this second portfolio task you are required to write a short overview of the macroeconomic environment relevant to your selected companies. Include the most important economic factors. Produce a short document for the PEST (or if relevant PESTLE) analysis. Use UWE-Harvard style referencing. (1000 word, excluding references).
3. The industry analysis and ethics form by 31st May 2024
In this third portfolio task you are required to give a short overview of the industry which your selected companies belong to. Your overview should contain summary information such as for instance, market value and volume, segmentation, key players. You should also produce a Porter's five forces analysis for the industry. Use UWE-Harvard style referencing. (1500 words, excluding references).
4. Financial statement analysis, financial ratio analysis by 5th July 2024
In this fourth portfolio task you are required to perform a company analysis in the form of comparative analysis by using financial ratios for your target companies. You will offer a short explanation of the ratios. The financial ratios should include: Investment Ratios, Gearing Ratios, Profitability Ratios, Liquidity Ratios, Efficiency Ratios. Use UWE-Harvard style referencing. (1000 words, excluding references).

There is some flexibility about the format of the portfolio submissions. Please refer to module workbook for more guidance on how to complete each task. You will be given feedback on each task by your mentor within 3 weeks of the submission date. Make sure you arrange a feedback meeting with your mentor following the submission of each task and that you make changes to your portfolio in line with the advice that you are given.

What do I need to do to pass?

You must achieve a minimum of 50% in this task to pass. You should be prepared for the critical discussion, have submitted all the portfolio elements and received and acted on feedback from your research mentor.

How do I achieve high marks in this assessment?

Engaging with the workbook and mentor feedback will help you to achieve high marks in this assessment. The criteria for each level of attainment are given in the marking grid at the end of this brief. You need to prepare and being able to discuss and defend your arguments. Practice also to describe your project and explain how you designed it and engaged with it.

What additional resources may help me complete this assessment?

- Attending all five meetings your mentor.
- Assessments tab on Blackboard.
- Formative feedback on draft presentation plan in tutorials.
- Module Leader's office hours as per Blackboard.
- The UWE Library Study Skills pages for online support and bookable workshops.
- Learning Hub's bookable workshops.
- Guidance on using UWE's Library FAQs and other resources on your Blackboard site.
- Specific UWE library study skills pages i.e. <https://www.uwe.ac.uk/study/study-support/study-skills>.

What do I do if I am concerned about completing this assessment?

UWE Bristol offer a range of Assessment Support Options that you can explore through [this link](#), and both [Academic Support](#) and [Wellbeing Support](#) are available.

For further information, please see the [Academic Survival Guide](#).

How do I avoid an Assessment Offence on this module? ²

Use the support above if you feel unable to submit your own work for this module.

Speak to the Module Leader or your tutor if you have any queries about the suitability of sources or the work you are producing.

Marks and Feedback

Your assessment will be marked according to the marking rubric at the end of this document.

You can use these to evaluate your own work before you submit.

1. In line with UWE Bristol's [Assessment Content Limit Policy](#) (formerly the Word Count Policy), word count includes all text, including (but not limited to): the main body of text (including headings), all citations (both in and out of brackets), text boxes, tables and graphs, figures and diagrams, quotes, lists.
2. UWE Bristol's [UWE's Assessment Offences Policy](#) requires that you submit work that is entirely your own and reflects your own learning, so it is important to:

- Ensure you reference all sources used, using the [UWE Harvard](#) system and the guidance available on [UWE's Study Skills referencing pages](#).
- Avoid copying and pasting any work into this assessment, including your own previous assessments, work from other students or internet sources
- Develop your own style, arguments and wording, so avoid copying sources and changing individual words but keeping, essentially, the same sentences and/or structures from other sources
- Never give your work to others who may copy it
- If an individual assessment, develop your own work and preparation, and do not allow anyone to make amendments on your work (including proof-readers, who may highlight issues but not edit the work) and

When submitting your work, you will be required to confirm that the work is your own, and text-matching software and other methods are routinely used to check submissions against other submissions to the university and internet sources. Details of what constitutes plagiarism and how to avoid it can be found on UWE's Study Skills [pages about avoiding plagiarism](#).

Ethics approval: this must be granted by your mentor *before* data is collected. Failure to submit the online ethics form with your mentor will be considered an automatic assessment offence. This work will not be marked if an online ethics form is not submitted, or if any data collection activity was not signed off at the ethics approval stage, or if any data collection activity breaches university ethics guidelines.

Criteria	Met	Not met
Ethics	Clear plans for data privacy/protection, informed consent, opportunity to withdraw, anonymity and confidentiality are outlined. Ethics approval was granted before data collection.	Ethics approval not granted before data collection. Any breach of this ethics approval. Lack of clarity about plans for data privacy/protection, informed consent, opportunity to withdraw, anonymity and/or confidentiality

Marking criteria to inform your approach and determine grade:

Criteria	PASS with HIGH DISTINCTION Outstanding (85-100)	PASS with DISTINCTION Very good/Excellent (70-84)	PASS with MERIT Good /Very good (60-69)	PASS Satisfactory (needs some improvement) (50-59)	MARGINAL FAIL (Failed to meet some criteria) (45-49)	FAIL (Failed to meet a number of criteria) (0-44)
Ability to defend arguments and choices verbally (50% of submission)	You demonstrate an outstanding understanding of the topic, critical thinking, research abilities, and excellent ability to defend your arguments and choices	You demonstrate an excellent understanding of the topic, critical thinking, research abilities, and very good ability to defend your arguments and choices	You demonstrate a very good understanding of the topic, critical thinking, research abilities, and good ability to defend your arguments and choices	You demonstrate a good understanding of the topic, critical thinking, research abilities, and satisfactory ability to defend your arguments and choices	You demonstrate a limited understanding of the topic, critical thinking, research abilities, and little ability to defend your arguments and choices	You fail to demonstrate any understanding of the topic, and was unable to defend your arguments and choices
Background, Macro and Industry Analyses - Placing discussion in context of literature	You discuss the economic and industry factors in relation to the target companies, indicating clearly and comprehensively the potential impact of each of the factors discussed	You discuss the economic and industry factors in relation to the target companies, indicating clearly the potential impact of each of the factors discussed	You discuss the economic and industry factors in relation to the target companies, indicating the potential impact of each of the factors discussed on the	You make some links between your discussion and the target companies, identifying instances where some factors may have an impact on the companies.	The discussion is weakly linked to target companies and no further relevant sources identified. The economic and industry factors are discussed in general,	The discussion is only occasionally linked to the target companies and no further relevant sources identified.

<p>- Economic issues relating to financial position of companies.</p> <p>- Rigour and objectivity in considering evidence relating to the relevant industry.</p> <p>- Strength of reasoning relating to the financial position of the companies.</p> <p>(30% of submission)</p>	<p>on the financial position of the target companies.</p> <p>You show a critical understanding of your research focus, approach and context.</p> <p>You clearly and comprehensively link the PESTEL analysis and Porter forces to your target industry and companies</p>	<p>on the financial position of the target companies.</p> <p>You show a good understanding of your research focus, approach and context.</p> <p>You clearly link the PESTEL analysis and Porter forces to your target industry and companies</p>	<p>financial position of the target companies.</p> <p>You show reasonable understanding of your research focus, approach and context.</p> <p>You provide some good link between the PESTEL analysis and Porter forces and your target industry and companies</p>	<p></p> <p>You show some understanding of your research focus, approach and context.</p> <p>You provide some link between the PESTEL analysis and Porter forces and your target industry and companies</p>	<p>with few to specific outcomes highlighted.</p> <p>You show little understanding of your research focus, approach and context.</p> <p>You provide little link between the PESTEL analysis and Porter forces and your target industry and companies</p>	<p></p> <p>You fail to show any understanding of your research focus, approach and context.</p> <p>You provide no link between the PESTEL analysis and Porter forces and your target industry and companies</p>
<p>Data analysis</p> <p>- Sophistication of analysis methods and fit with target companies.</p> <p>- Sophistication of the analysis</p> <p>- Correct use of methods</p> <p>- Understanding of limitations.</p> <p>(20% of submission)</p>	<p>You have analysed your data very rigorously, focusing your analysis on your target companies. You have used sophisticated analytical methods that are appropriate to the valuation approach. There are no errors in your analysis. You have shown a deep and comprehensive understanding of the strengths and weaknesses of your data and of your analysis process.</p>	<p>You have analysed your data rigorously, focusing your analysis on your target companies. You have used advanced analytical methods that are appropriate to your valuation approach. There are no significant errors in your analysis. You have shown a clear understanding of the strengths and weaknesses of your data and of your analysis process.</p>	<p>You have analysed your data comprehensively, making clear links between your analysis and your target companies. You have used sound analytical methods that are appropriate to your valuation approach. There are only minor errors in your analysis. You have considered the strengths and weakness of your data and your analysis process.</p>	<p>You have made little attempt to prioritise your analysis in line with your target companies, presenting largely generic data analysis. Your analysis methods are basic, albeit appropriate to the valuation approach. There are a few important errors in your analysis, though it is largely correct. You have given little consideration to the strengths and weaknesses of your data and your analysis process, though this has been attempted.</p>	<p>You have made no attempt to prioritise your analysis in line with your target companies, presenting only generic data analysis. Your analysis methods are not clear or are not appropriate to your valuation approach. There are major errors in your analysis. You have presented no meaningful reflection on the strengths and weaknesses of your data or the analysis process.</p>	<p>You have presented little analysis of the data you have collected, and/or little evidence of having collected any appropriate data. Your analysis methods are not clear or are not appropriate to your valuation approach. Most of the analysis is incorrect. You have made no attempt to reflect on the strengths and weaknesses of your data or the analysis process.</p>

