

Valid for 2024.FS

Module Name: Capital Investment and Pension Planning	
Module Code	w.BA.XX.3KaV-RI.XX
Module Description	This module offers an introduction to the Swiss social security system and the topic of capital investments and financial instruments.
Program and Specialization	Business Administration - Specialization in Risk and Insurance
Legal Framework	Academic Regulations BSc dated 29.01.2009, for the degree programs in Business Administration, International Management, Business Information Technology, Business Law, Business Law and Applied Law, first adopted on 12.05.2009
Module Category	Module Type: Compulsory
	Program Phase: Main Study Period
ECTS	6
Organizational Unit	W Institut für Risk & Insurance
Module Coordinator	Markus Moor (moor)
Deputy Module Coordinator	Roland Hofmann (horo)
Prerequisite Knowledge	Especially for the course on the Swiss social security system: A basic knowledge of finance, business administration, economics, law, maths, and statistics is required. Especially for the course on capital investments: A basic knowledge of the main institutions (banks, insurance companies, and stock exchanges) and the basic terminology of the financial markets and financial instruments (shares, obligations) is required. A minimal knowledge of maths is sufficient, but formulas will be used. Furthermore, a basic understanding of statistical methods is necessary. Calculator and EXCEL skills are also required.
Contribution to Program Learning Goals (Affected by Module)	§ Professional Competence § Methodological Competence § Self-Competence
Contribution to Program Learning Objectives	Professional Competence § Knowing and Understanding Content of Theoretical and Practical Relevance § Apply, Analyze, and Synthesize Content of Theoretical and Practical Relevance § Evaluate Content of Theoretical and Practical Relevance Methodological Competence § Problem-Solving & Critical Thinking § Scientific Methodology § Work Methods, Techniques, and Procedures § Information Literacy § Creativity & Innovation Self-Competence § Self-Management & Self-Reflection § Ethical & Social Responsibility § Learning & Change
Module Learning Objectives	Students... § For the course on the Swiss social security system - Students are introduced to the Swiss social security system with a focus on the main social insurance institutions. § For the course on capital investments - Structuring: Students become familiar with the classification and organization of the individual topics of Finance. Concepts: Students develop a fundamental knowledge of financial economic analysis (e.g., return, risk, diversification). Institutional aspects and financial products are used for illustration. References: Students understand the relevance of what they learn to financial practice. Connectivity to advanced studies is provided. Application of learning.
Module Content	§ For the course on the Swiss security system: various Swiss institutions and instruments such as AHV, BVG, Pillar 3a/b, UVG, IV, KVG, ALV. § For the course on capital investments: introduction to finance, return and risk, interest rates and bonds, portfolio theory, capital market theory, portfolio management, derivatives, and options.
Links to other modules	-
Methods of Instruction	§ Lecture § Interactive Instruction § Application Tasks § Case Studies § Exercises § Literature Review
	Social Settings Used: Individual Work

Digital Resources	§ Teaching Videos § Practice and Application Exercises (with Key) § Case Studies (with Key)		
Type of Instruction	Classroom Instruction	Guided Self-Study	Autonomous Self-Study
Large Class	28 h	-	
Small Class	28 h	-	
Group Instruction	-	-	
Practical Work	-	-	
Seminar	-	-	
Total	56 h	0 h	124 h
Performance Assessment			
End-of-module exam	Form	Length (min.)	Weighting
Written exam	Open book	60	100,00 %
Permitted Resources	Free choice of calculator	With dictionary	
Others			
	Assessment	Length (min.)	Weighting
-	-	-	-
Classroom Attendance Requirement	Mandatory Attendance: None		
Language of Instruction/Examination	German		
Compulsory Reading	§ Bollier, G. (2022). Leitfaden schweizerische Sozialversicherungen. 17th edition. Luzern: hrm4you.ch. ISBN 978-3-907182-17-8. --> for the course on the Swiss social security system, selected chapters/sections acc. to semester program.		
Recommended Reading	§ Benninga, S. & Mofkadi, T. (2021). Financial Modeling. 5. Auflage. Cambridge/London: MIT Press. ISBN 978-0-262046-42-8. --> für den Kurs Kapitalanlagen, ausgewählte Kapitel/Abschnitte gemäss Semesterplan. ISBN 978-0-262046-42-8. § Seiler Zimmermann, Y. & Zimmermann, H. (2021). Finance Compact Plus, Band 1 und Band 2. Basel: NZZ Libro. ISBN 978-3-907291-31-3. --> für den Kurs Kapitalanlagen, ausgewählte Kapitel/Abschnitte gemäss Semesterplan. ISBN 978-3-907291-31-3.		
Comments	-		