The Hong Kong Polytechnic University

Subject Description Form

Subject Code	AMA2201
Subject Title	Introduction to Bloomberg
Credit Value	1
Level	2
Pre-requisite/ Co-requisite/ Exclusion	Nil
Objectives	This subject aims to familiarize students with the Bloomberg Terminal, a standard industry tool for real-time financial data and analytics. Students will learn to navigate the interface, retrieve and analyse market data across various asset classes (including equities, fixed income and currencies), and extract data for further statistical analysis. The subject bridges the gap between theoretical financial knowledge and practical data acquisition, enabling students to obtain high-quality datasets for research, modelling and machine learning applications.
Intended Learning Outcomes	Upon completion of the subject, students will be able to: (a) use the Bloomberg Terminal interface and core functions to locate information efficiently; (b) retrieve and interpret financial news, economic indicators, and market data; (c) screen and analyse securities using fundamental and technical information; (d) construct and monitor a basic portfolio and summarise performance; (e) export data via Bloomberg's Excel tools for subsequent statistical analysis; (f) independently resolve unfamiliar data-retrieval tasks using Terminal help/search features.

Subject Synopsis/ Indicative Syllabus	Students are required to attend weekly sessions to practice hands-on data retrieval and analysis. The detailed framework includes:
	• Terminal Basics: System navigation, keyboard functions, creating a login, and using the Help (HELP) and Launchpad functionalities.
	• News and Economics: Monitoring top market news (TOP), searching for specific news items (READ), and analyzing economic indicators and calendars (ECO, ECST).
	• Equity Analysis:
	  • Security description and profile (DES).
	  • Fundamental analysis and financial statements (FA).
	  • Equity screening and filtering based on custom criteria (EQS).
	  • Analyst recommendations and earnings estimates (ANR, EE).
	• Market Valuation: Relative valuation (RV) and peer comparison.

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Fixed Income: Basics of bond search (SRCH), yield analysis (YAS), and credit ratings.
Currencies and Commodities: Monitoring FX rates (FXIP) and commodity prices (GLCO).
Charting and Visualization: Creating historical price charts (GP) and technical analysis overlays.
Portfolio Management: Creating and monitoring a portfolio of assets (PRTU).
Data Export and API:

Using the Bloomberg Excel Add-in.
Mastering key formulas (BDP, BDH) to pull static and historical data.
Preparing datasets for export to R/Python for advanced statistical analysis.
Integrating Bloomberg into Python using blpapi.

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<tr><td>Teaching/Learning Methodology</td><td>The subject is delivered exclusively through interactive laboratory-based workshops held in computer lab with Bloomberg Terminals. The pedagogical approach emphasizes "learning by doing," where students directly engage with live financial data during every class session. Interactive demonstrations, hands-on practice and data integration exercises will be emphasized in this subject.

Students are encouraged to complete the Bloomberg Market Concepts e-learning modules (Core Concepts) upon completion of this course.</td></tr>
<tr><td>Assessment Methods in Alignment with Intended Learning Outcomes</td><td>
<table>
<tr><td rowspan="2">Specific assessment methods/tasks</td><td rowspan="2">% weighting</td><td colspan="6">Intended subject learning outcomes to be assessed (Please tick as appropriate)</td></tr>
<tr><td>a</td><td>b</td><td>c</td><td>d</td><td>e</td><td>f</td></tr>
<tr><td>1. Quizzes</td><td>30</td><td>✓</td><td>✓</td><td>✓</td><td></td><td>✓</td><td></td></tr>
<tr><td>2. Lab participation</td><td>20</td><td>✓</td><td>✓</td><td>✓</td><td>✓</td><td>✓</td><td>✓</td></tr>
<tr><td>3. Project</td><td>50</td><td>✓</td><td>✓</td><td>✓</td><td>✓</td><td>✓</td><td></td></tr>
<tr><td>Total</td><td>100 %</td><td colspan="6"></td></tr>
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Explanation of the appropriateness of the assessment methods in assessing the intended learning outcomes:

Quizzes and lab participation (weekly tasks) work well for a Bloomberg course because they can directly test command fluency in a short, controlled task. A project is strongly recommended because it assesses integrated competence (retrieve data → clean/export → interpret) rather than isolated commands.
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<tr><td>Student Study Effort Expected</td><td>
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<tr><td>Class contact:</td><td></td></tr>
<tr><td>▪ Workshop</td><td>13 Hrs.</td></tr>
<tr><td>Other student study effort:</td><td></td></tr>
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	▪ Project	12 Hrs.
	▪ Self-Study	15 Hrs.
	Total student study effort	40 Hrs.
Reading List and References	Nicola Borri (2025). A Bloomberg Terminal Primer: Revised Edition. Editrice Minerva Bancaria. ExplainHowToSimplify (2023). Bloomberg Terminal Beginner's Guide. Bloomberg L.P. Bloomberg Market Concepts (BMC) Student Guide. Bloomberg L.P. Getting Started on the Bloomberg Terminal.	