



COURSE SYLLABUS

«Management of innovative and investment activity»

Degree of higher education - Bachelor
Specialization 073 Management
Educational Program “Management”
Academic Year 3 _____, Term 5,6 _____

Form of study Full-time
Number of ECTS credits 6
Language of instruction English

Lecturer of the course

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Course page on eLearn

<https://elearn.nubip.edu.ua/enrol/index.php?id=5090>

COURSE DESCRIPTION

(up to 1000 printed characters)

The educational component “Management of innovation and investment activity” belongs to the compulsory disciplines in the speciality Management.

Competencies of the educational programme:

Integrative competency (IC): the ability to solve complex specialized problems and practical problems characterized by complex and uncertain conditions in the field of innovation and investment management or in the learning process, which involves the use of theories and methods of social and behavioral sciences;

General competencies (GC):

GQ8. Skills of using information and communication technologies.;

GQ13. Appreciation and respect for diversity and multiculturalism;

Professional (special) competencies (PC):

PC1. Ability to define and describe characteristics of an organization;

PC2. Ability to analyze the results of an organization's activities, to compare them with the factors of influence of the external and internal environment;

PC5. Ability to manage an organization and its divisions through the implementation of management functions;

PC6. Ability to act socially responsibly and consciously;

PC7. Ability to choose and use modern management tools;

PC10. Ability to evaluate the performed work, ensure its quality and motivate personnel of an organization.

PC11. Ability to create and organize effective communications in the management process.

PC12. Ability to analyze and structure organizational problems, form reasonable solutions.

PC16. Ability to identify and analyze new market opportunities, including the international business environment, formulate new ideas, develop projects and organize business process management.

Program learning outcomes (PLO) of the educational programme:

PLO6. Demonstrate the skills of searching, collecting and analyzing information, calculating;

PLO8. Apply management methods to ensure the effectiveness of indicators to justify management decisions;

PLO18. Demonstrate the ability to identify prospects for enterprise development, develop projects, organize business process management based on the analysis of market opportunities and the international business environment.

COURSE STRUCTURE

Topic	Hours (lectures/ practical classes)	Learning outcomes	Tasks	Assessment
Semester 5				
Module 1. Management of investment activity				
Content module 1. Theoretical foundations of investment activity				
Topic 1. Theoretical basics of investment activity	4/4	Know the economic essence of investments, their classification. Basic concepts of investment activity. Investment entities. Purpose and directions of investment management	Execution and delivery of practical, independent work, writing of tests (including in elearn).	PW-5 grades IW -2 grades
Topic 2. Investment market	6/6	To know characteristics of investment market, its structure and functions. The mechanism of functioning and regulation of the investment market. Investment market conditions. Investment climate. The concept of investment attractiveness.	Execution and delivery of practical, independent work, writing of essays (including in elearn).	PW-5 grades IW -2 grades
Topic 3. Investment resources	4/4	Know characteristics of investment resources and the order of their formation. Estimation of investment resources. Methods of forecasting the total amount of investment resources Sources and methods of formation of investment resources Optimization of the cost and structure of investment resources Formation and optimization	Execution and delivery of practical, independent work, writing of essays (including in elearn).	PW-5 grades IW -2 grades

		of the capital investment budget		
Topic 4. Real and financial investments	4/4	Know economic essence and basic forms of real investment. Valuation of real investment objects. Real investment program and its optimization. Financial investments of the enterprise and their forms. Estimating the value and return on financial investments. The main instruments of the domestic stock market.	Execution and delivery of practical, independent work, writing of essays (including in elearn).	PW- 5 grades IW - 2 grades
Topic 5. International investment activity	4/4	Know characteristics of foreign investment. The main directions of international investment activity. International financial institutions and their functions in the investment market. Special economic zones, the purpose of creation and ways to attract foreign capital	Execution and delivery of practical, independent work, writing of essays (including in elearn).	PW-5 grades IW -2 grades
Content module 2. Management of investment activity realization				
Topic 6. Management and planning of investment activity of organizations	5/5	Be able to solve tasks of investment planning. To consider business plan as an investment planning tool. Time factor in investment analysis Determining the rate and level of inflation, inflation premium. Investment projects, their classification and evaluation methods.	Execution and delivery of practical, independent work, writing of essays (including in elearn).	PW- 5 grades IW - 2 grades
Topic 7. Management of investment portfolio	4/4	Know goals and objectives of investment portfolio formation, its types. Stages of investment portfolio formation and approaches to its management. Effective and optimal investment portfolios. Operational management of the investment portfolio and its restructuring	Execution and delivery of practical, independent work, writing of essays (including in elearn).	PW- 5 grades IW - 2 grades

Topic 8. Evaluation of the effectiveness of investment decisions	6/6	Be able to analyze the methods of survey of organizations. Basic principles and methods of assessing the efficiency and financial feasibility of investment activities Characteristics of indicators of attractiveness of the investment market..	Execution and delivery of practical, independent work, writing of essays (including in elearn).	PW- 5 grades IW - 2 grades
Topic 9. Prospects for achieving economic efficiency of investment activity	4/4	Be able to forecast the return on investment. Ways to achieve economic efficiency of investment activities of organizations. Risk analysis of investment processes	Execution and delivery of practical, independent work, writing of essays (including in elearn).	PW- 5 grades IW - 2 grades
Topic 10. Features of innovation investment management	4/4	Know the essence of innovative investments and their importance for the economic development of the enterprise and the country as a whole. Justification of investments in innovative projects and evaluation of their effectiveness. Features of venture capital	Execution and delivery of practical, independent work, writing of essays (including in elearn).	PW- 5 grades IW - 2 grades
Total for the 5th term				70
Credit	45/45			30
Total for the semester				100
Semester 6				
Module 2. Management of innovative activity				
Content module 3. Theoretical basis of innovative activity				
Topic 11. The essence of the concept of innovation management	2/2	Know the basic concepts and categories of innovation management. Understand the innovation process model.	Execution and delivery of practical, independent work, writing of essays (including in elearn).	PW- 5 grades IW - 3 grades
Topic 12. Innovative activity as an object of management	2/2	Understand the essence of the concept of “innovative process” and “innovative activity”, its stages at the macro and micro levels. Be able to assess the impact of external and internal environmental factors on innovative activity.	Execution and delivery of practical, independent work, writing of essays (including in elearn).	PW- 5 grades IW - 3 grades

Topic 13. Innovative strategy selection	2/2	Understand the essence and features of innovative strategies. To understand the expediency of choosing a certain type of innovative strategy at different stages of the organization's development. To be able to apply methods of substantiation and selection of innovative strategies.	Execution and delivery of practical, independent work, writing of essays (including in elearn).	PW- 5 grades IW - 3 grades
Topic 14. Organizational forms of innovative activity	2/2	Understand the principles of organizing innovative processes. Know the types of scientific, project and innovation organizations. Determine the peculiarities of management in scientific organizations and small innovative organizations.	Execution and delivery of practical, independent work, writing of essays (including in elearn).	PW- 5 grades IW - 3 grades
Content module 4. Innovative development of enterprise and efficiency of innovative activities determining				
Topic 15. Management of innovative development of organization	2/2	To understand the process of strategic management of innovative development of the organization. Know the strategy of innovations and their classification. To determine the peculiarities of the development, implementation of the innovative strategy.	Execution and delivery of practical, independent work, writing of essays (including in elearn).	PW- 5 grades IW - 4 grades
Topic 16. Technology transfer	2/2	Understand the essence of technology transfer and its types. Know the life cycle of an innovative project. Determine the stages and results of technology transfer.	Execution and delivery of practical, independent work, writing of essays (including in elearn).	PW- 5 grades IW - 4 grades
Topic 17. Evaluation of innovation effectiveness	2/2	Understand the peculiarities of calculating the economic efficiency of innovations. To be aware of the main indicators of the effectiveness of innovative activity. Be able to evaluate and calculate indicators of the efficiency of innovations.	Execution and delivery of practical, independent work, writing of essays (including in elearn).	PW- 5 grades IW - 4 grades

Topic 18. Legislative regulation of innovative activity	1/1	Understand the principles and approaches of state support for innovative and investment activities in Ukraine and other developed countries of the world. To be aware of the possibilities of organizations in obtaining state support for their innovative activities and attracting private investments for the purpose of developing innovative activities.	Execution and delivery of practical, independent work, writing of essays (including in elearn).	PW- 5 grades IW - 4 grades
Total for the 6th term				70
Exam	15/15			30
Total for the semester				100

ASSESSMENT POLICY

<i>Policy regarding deadlines and resits:</i>	Assignments submitted after the deadline without valid reasons will be graded lower. Resitting of modules will be allowed with the permission from the lecturer and in the presence of valid reasons (e.g. medical reasons).
<i>Academic honesty policy:</i>	Cheating during tests and exams is strictly prohibited (including the use of mobile devices). Coursework and research papers must contain correct citations for all sources used.
<i>Attendance policy:</i>	Class attendance is mandatory. In case of objective reasons (such as illness or international internships), individual learning may be allowed (in online format by the approval of the dean of the faculty).

SCALE OF ASSESSMENT OF STUDENT KNOWLEDGE

Student rating, points	National grade based on exam results	
	exams	credits
90-100	excellent	passed
74-89	good	
60-73	satisfactory	
0-59	unsatisfactory	not passed

RECOMMENDED SOURCES OF INFORMATION

Basic:

1. Закон України «Про інвестиційну діяльність» від 18.09.1991 р. № 1560-XII (із змінами і доповненнями). Офіційний сайт Верховної Ради України. Електронний ресурс. URL: <http://zakon2.rada.gov.ua/laws/main/1560-12>.

2. Бланк І. О., Гуляєва Н. М. Інвестиційний менеджмент : підручник. заг. ред. А. А. Мазаракі. К., 2003. 397 с.
3. Закон України «Про інноваційну діяльність» від 04.07.2002 р. № 40-IV (із змінами і доповненнями). Офіційний сайт Верховної Ради України. Веб-сайт. URL: <https://zakon.rada.gov.ua/laws/show/40-15#Text>. (дата звернення: 20.04.2023)
4. Investment management: study guide for students of the specialty 073 “Management”. L.V. Shynkaruk, M.M. Dielini, T.O. Vlasenko, A.V. Dergach. Kyiv: NULES, 2023. 336 p.
5. Frank J. Fabozzi, Sergio M. Focardi & Caroline Jonas (2014) Investment management: a science to teach or an art to learn? CFA Institute research foundation.
6. Ephreim Matanda (2020). Modern Financial Investment Management. Cambridge Scholars Publishing.
7. Security analysis and investment management. Lessons 1 to 6. URL : <http://icdeolhpu.org/downloads/course-406FM-02.pdf>.
8. Preeti Singh. (2016) Investment Management. Himalaya Publishing House Pvt. Ltd., Mumbai. URL : <http://www.himpub.com/documents/Chapter1893.pdf>
9. Shakti Singh (2020). Investment management. Maharshi Dayanand University Press. 72 p. URL : [https://mdu.ac.in/UpFiles/UpPdfFiles/2021/Jun/4_06-11-2021_15-04-44_Investment%20Management\(20MCO22C2\)%20\(1\).pdf](https://mdu.ac.in/UpFiles/UpPdfFiles/2021/Jun/4_06-11-2021_15-04-44_Investment%20Management(20MCO22C2)%20(1).pdf)
10. Robert L. Hagin. (2004) Investment management. Portfolio diversification, risk, and Timing – Fact and Fiction. 304 p. URL : [http://gitamskadapa.org/library/books/mba3sem/IPM/Wiley_Finance_Investment_Management_-_Portfolio_Diversification_Risk%20\(1\).pdf](http://gitamskadapa.org/library/books/mba3sem/IPM/Wiley_Finance_Investment_Management_-_Portfolio_Diversification_Risk%20(1).pdf).

Additional:

1. Селіверстова Л. С., Міх О. М. Інвестиційна політика підприємства в контексті забезпечення сталого розвитку країни. *Ефективна економіка*. 2019. № 11. URL: <http://www.economy.nayka.com.ua/?op=1&z=7433>
2. Бударна В. О. Інвестиційна політика України: досвід законодавчого забезпечення. *Економіка та право*. 2018. № 2. С. 41-49. URL: http://nbuv.gov.ua/UJRN/еспр_2018_2_5
3. Петровський П.М. Державна інвестиційна політика у сфері сільського господарства України. Державно-управлінські студії. Т.1, №11. 2019.
4. Гурочкіна В. В. Інвестиційна політика підприємства: матриця стейкхолдерів та драйвери розвитку взаємодії. *Вісник Хмельницького національного університету*. Економічні науки. 2019. № 4, Том 2. С. 89–97.
5. Паньков О.Б. Управління інвестиційною діяльністю як базовий складник економічної безпеки підприємства. *Держава та регіони. Серія: Економіка та підприємництво*. 2020. № 4(115). С. 90-93. URL: http://www.econom.stateandregions.zp.ua/journal/2020/4_2020/18.pdf
6. Bannikov, V., Lobunets T., Buriak, I., Maslyhan, O., Shevchuk, L. On the question of the role of project management in the digital transformation of small and medium-sized businesses: essence and innovative potential. *Amazonia Investiga* Том 11. 2022. № 55. P. 334-343. URL: <https://amazoniainvestiga.info/index.php/amazonia/article/view/2105>
7. Vlasenko T.O., Chernysh, R.F., Dergach, A.V., Lobunets T.V., Kurylo, O.B. Investment security management in transition economies: Legal and organizational aspects. *International Journal of Economics and Business Administration*. №8(2). 2020. P. 200-209. URL: <https://ijebe.com/journal/452>

8. Dobrianska N.A., Torishnya L.A. (2019). The current state of investments attraction into the regional economy. *Economic journal Odessa polytechnic university*, 1 (7), 5-12. URL : <https://economics.opu.ua/ejopu/2019/No1/5.pdf>.
9. Simkova, T. and Baida, O. (2020), "Formation of the enterprise investment activity management system", *Efektivna ekonomika*, vol. 12, URL : <http://www.economy.nayka.com.ua/?op=1&z=8465>
10. 2021 investment management outlook. Transforming to thrive. A report from the Deloitte Center for financial services. URL : <https://www2.deloitte.com/content/dam/Deloitte/tr/Documents/financial-services/2021-investment-management-outlook.pdf>
11. Principles of investment management for long-term funds. (2014). URL : <https://www.ctphilanthropy.org/sites/default/files/resources/Principles-of-Investment-Management.pdf>
12. Priscilla Luk and Arpit Gupta, "SPIVA® Japan year-end 2019," S&P Dow Jones Indices, April 6, 2020.
13. Sridhar Natarajan and Michelle F. Davis, "Wall Street return-to-work push finds virus won't cooperate," Bloomberg, September 18, 2020.
14. Investment management risk assessment: marketing and selling practices. A report on the technical committee of the International Organization of Securities Commissions. URL : <https://www.iosco.org/library/pubdocs/pdf/IOSCOPD156.pdf>
15. Dobrianska N.A., Torishnya L. A., Pulcha D.O. Management of investment processes in Ukraine at the regional level: the state and problems of improvement. *Economics: time realities*. Scientific journal. 2021. № 1 (53). P. 44-49. URL : <https://economics.opu.ua/files/archive/2021/No1/44.pdf>.
16. M.E. Konovalova, O. Yu. Kuzmina, A. M. Mikhaylov, L.V. Levchenko, S. Yu. Salomatina (2019). The management of Investment Portfolios. *TEM Journal*. Vol. 8, Iss. 3. P.928-937. URL : https://www.temjournal.com/content/83/TEMJournalAugust2019_928_937.pdf

Informational resources:

1. Верховна Рада України. URL: <http://www.portal.rada.gov.ua>
2. Законодавство України. URL: <https://zakon.rada.gov.ua/>
3. Кабінет Міністрів України. URL: <http://www.kmu.gov.ua>
4. Міністерство фінансів. URL: <http://www.minfin.gov.ua>
5. Міністерство економіки України. URL : <https://www.me.gov.ua/?lang=uk-UA>
6. Державна податкова служба України URL: <http://www.tax.gov.ua>
7. Державна служба статистики України. URL: <http://www.ukrstat.gov.ua>
8. Національний інститут стратегічних досліджень. URL: <http://www.niss.gov.ua>
9. Центр перспективних соціальних досліджень. URL: <http://www.cpsr.org.ua>