

**NATIONAL UNIVERSITY OF LIFE AND ENVIRONMENTAL SCIENCES OF  
UKRAINE**

Department of Production and Investment Management

**APPROVED**

Faculty of Agricultural Management

“05” June 2025

**CURRICULUM OF ACADEMIC DISCIPLINE  
«MANAGEMENT OF ASSETS AND INVESTMENT PORTFOLIO»**

Area of knowledge	<u>07 Management and Administration</u>
Specialty	<u>073 «Management»</u>
Academic programme	<u>«Management»</u>
Faculty (Education and Research Institute)	<u>Agricultural Management</u>
Developed by:	<u>Chemodurov O., PhD in Economics, Associate Professor of the Department of Production and Investment Management</u>

Kyiv – 2025

**NATIONAL UNIVERSITY OF LIFE AND ENVIRONMENTAL SCIENCES OF  
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**APPROVED**

Dean of the Faculty of Agricultural Management

\_\_\_\_\_ Anatolii OSTAPCHUK

“05” June 2025

**APPROVED**

at the meeting of the Department of Production and  
Investment Management

Minutes № 13, “28 ” May 2025

Head of the Department \_\_\_\_\_ Tetiana VLASENKO

**REVIEWED**

Program Coordinator \_\_\_\_\_

\_\_\_\_\_ Vira BUTENKO

**CURRICULUM OF ACADEMIC DISCIPLINE**

**«MANAGEMENT OF ASSETS AND INVESTMENT PORTFOLIO»**

Area of knowledge 07 Management and Administration

Specialty 073 «Management»

Academic programme «Management»

Faculty (Education and Agricultural Management

Research Institute)

Developed by: Chemodurov O., PhD of Economics, Associate Professor, Associate  
Professor of the Department of Production and Investment  
Management; Holieva M., PhD, Assistant of the Department of  
Production and Investment Management

## **Description of the discipline Management of assets and investment portfolio**

*(up to 1,000 printed characters)*

Management of Assets and Investment Portfolio is an academic discipline designed to provide students with comprehensive knowledge and practical competencies in managing financial assets and constructing effective investment portfolios. The course covers key principles of asset allocation, diversification, risk-return analysis, and investment performance evaluation. It introduces modern portfolio theory, behavioral finance insights, and strategic vs. tactical portfolio management approaches. Special focus is given to the analysis of various asset classes—including equities, fixed income, derivatives, and alternative investments—as well as to portfolio optimization techniques using quantitative models. Students gain hands-on experience in developing and rebalancing portfolios under different market conditions and investment goals. The discipline cultivates decision-making skills in managing institutional and individual portfolios, ensuring alignment with risk tolerance, time horizon, and regulatory constraints. Upon completion, students will be able to design and manage investment portfolios that are robust, adaptive, and aligned with long-term financial objectives.

Area of knowledge, specialty, academic programme, academic degree		
Academic degree	bachelor's	
Specialty	073 «Management»	
Academic programme	Management	
Characteristics of the discipline		
Type	Optional	
Total number of hours	180	
Number of ECTS credits	6	
Number of modules	2	
Course project (work) (if any)	-	
Form of assessment	exam	
Indicators of the discipline for full-time and part-time forms of university study		
	University study	
	Full-time	Part-time
Year of study	4	
Term	8	
Lectures	24 hours	
Practical classes and seminars	36 hours	
Laboratory classes	-	
Self-study	120 hours	
Number of hours per week for full-time students	4 hours	

## **1. Aim, competences and expected learning outcomes of the discipline**

**The purpose of the discipline** is to reveal the essence and mechanisms of asset formation and investment portfolio development; to build a theoretical and methodological foundation necessary for mastering the practical use of financial instruments for attracting investments. The course aims to develop the ability to evaluate and analyze national investment policies, investment portfolios, and investment projects. This will enable future specialists to acquire the theoretical knowledge and methodological tools required for the effective practical application of investment instruments.

### ***Competences acquired:***

***Integral competence (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 competence (GC):***

GC 5. Knowledge and understanding of the subject area and understanding of professional activity.

### ***Special (professional) competence (SC):***

SC 1. Ability to identify and describe the characteristics of an organization.

SC 3. Ability to determine the prospects for organizational development.

SC 4. Ability to define the functional areas of an organization and the interconnections between them.

SC 5. Ability to manage an organization and its subdivisions through the implementation of management functions.

SC 7. Ability to select and apply modern management tools.

SC 11. Ability to create and organize effective communication in the management process.

SC 14. Understanding of psychological principles and their application in professional activities.

SC 15. Ability to develop and demonstrate leadership qualities and behavioral skills.

### ***Program learning outcomes (PLO):***

PLO 8. Apply management methods to ensure the efficiency of an organization's activities.

PLO 16. Demonstrate skills of independent work, flexible thinking, openness to new knowledge, and the ability to be critical and self-critical.

PLO 19. Demonstrate the ability to make independent decisions, develop a sufficient number of alternative options, choose optimal solutions, and take responsibility for their implementation.

PLO 20. Ability to solve complex and unpredictable tasks and problems in specialized areas of professional activity (agricultural sector).

PLO 24. Demonstrate the ability to develop project budgets, and to carry out project evaluation and monitoring.

## 2. Programme and structure of the discipline

Names of content modules and topics	Number of hours								
	full-time					part-time			
	weeks	total	including			including	total		
			l	p	ind		l	p	ind
1	2	3	4	5	6	7	8	9	10
<b>Module 1. Asset management</b>									
Topic 1. The basics of enterprise's asset management		30	4	6	20				
Topic 2. Management of Current and Non-Current Assets		30	4	6	20				
Topic 3. Effectiveness of Asset Management		30	4	6	20				
<b>Total for module 1</b>		<b>90</b>	<b>12</b>	<b>18</b>	<b>60</b>				
<b>Module 2. Investment portfolio management</b>									
Topic 4. Investment management		30	4	6	20				
Topic 5. Investment valuation mechanism		30	4	6	20				
Topic 6. Investment portfolio management system		30	4	6	20				
<b>Total for module 2</b>		<b>90</b>	<b>12</b>	<b>18</b>	<b>60</b>				
<b>Coursework</b>			-	-	-				
<b>Total hours</b>		<b>180</b>	<b>24</b>	<b>36</b>	<b>120</b>				

## 3. Topics of lectures

No.	Topic	Hours
<b>Module 1. Asset management</b>		
1	Topic 1. The basics of enterprise's asset management	4
2	Topic 2. Management of Current and Non-Current Assets	4
3	Topic 3. Effectiveness of Asset Management	4
<b>Module 2. Investment portfolio management</b>		
4	Topic 4. Investment management	4
5	Topic 5. Investment valuation mechanism	4
6	Topic 6. Investment portfolio management system	4
Total		24

## 4. Topic of laboratory (practical, seminars) classes

No.	Topic	Hours
<b>Module 1. Asset management</b>		
1	Topic 1. The basics of enterprise's asset management	6
2	Topic 2. Management of Current and Non-Current Assets	6
3	Topic 3. Effectiveness of Asset Management	6
<b>Module 2. Investment portfolio management</b>		
4	Topic 4. Investment management	6
5	Topic 5. Investment valuation mechanism	6

6	Topic 6. Investment portfolio management system	6
Total		36

## 5. Independent work

No.	Topic	Hours
<b>Module 1. Asset management</b>		
1	Asset management	60
<b>Module 2. Investment portfolio management</b>		
2	Investment portfolio management	60
Total		120

## 6. Methods of assessing expected learning outcomes:

- oral or written survey;
- interview;
- test;
- defending practical, design works;
- peer-to-peer assessment, self-assessment.

## 7. Teaching methods (*select necessary or add*):

- problem-based method;
- practice oriented studying method;
- case method;
- project education method;
- flipped classroom, mixed education method;
- research based method;
- learning discussions and debates method;
- team work, brainstorm method.

## 8. Results assessment.

The student's knowledge is assessed by means of a 100-point scale converted into the national grades according to the "Exam and Credit Regulations at NULES of Ukraine" in force

### 8.1. Distribution of points by types of educational activities

Educational activity	Results	Assessment
<b>Module 1. Asset management</b>		
Lecture 1. The basics of enterprise's asset management	PLO 8. Understand the structure of enterprise's asset. PLO 24. Demonstrate skills in analyzing enterprise's balance.	-
Practical work 1. The basics of enterprise's asset management		20
Lecture 2. Management of Current and Non-Current Assets	PLO 8. Understand the essence of current and non-current assets. PLO 19, 20. Demonstrate skills in management of current and non-current assets.	-
Practical work 2. Management of Current and Non-Current Assets		20
Lecture 3. Effectiveness of Asset Management	PLO 8. Understand the goals and measures of effectiveness of asset management. PLO 16, 24. Demonstrate the ability to achieve goals of asset management.	-
Practical work 3. Effectiveness of Asset Management		20
Self-study 1		10

Module control work 1.		<b>30</b>
<b>Total for module 1</b>		<b>100</b>
<b>Module 2. Investment portfolio management</b>		
Lecture 4. Investment management	PLO 8, 20. Understand the goals and tasks of investment management.	-
Practical work 4. Investment management		<b>20</b>
Lecture 5. Investment valuation mechanism	PLO 8, 16. Understand valuation methods of main types of investment assets: bonds, stocks etc.	-
Practical work 5. Investment valuation mechanism		<b>20</b>
Lecture 6. Investment portfolio management system	PLO 8, 16, 19, 20, 24. Demonstrate the decision-making skills in managing institutional and individual portfolios, ensuring alignment with risk tolerance, time horizon, and regulatory constraints.	-
Practical work 6. Investment portfolio management system		<b>20</b>
Self-study 2.		<b>10</b>
Module control work 2.		<b>30</b>
<b>Total for module 2</b>		<b>100</b>
<b>Class work</b>	<b><math>(M1 + M2)/2 \cdot 0,7 \leq 70</math></b>	
<b>Exam</b>	<b>30</b>	
<b>Total for year</b>	<b><math>(\text{Class work} + \text{exam}) \leq 100</math></b>	
Course project/work	-	-

## 8.2. Scale for assessing student's knowledge

Student's rating, points	National grading (exam/credits)
90-100	excellent
74-89	good
60-73	satisfactory
0-59	unsatisfactory

## 8.3. Assessment policy

<b>Deadlines and exam retaking rules</b>	works that are submitted late without valid reasons will be assessed with a lower grade. Module tests may be retaken with the permission of the lecturer if there are valid reasons (e.g. a sick leave).
<b>Academic integrity rules</b>	cheating during tests and exams is prohibited (including using mobile devices). Term papers and essays must have correct references to the literature used
<b>Attendance rules</b>	Attendance is compulsory. For good reasons (e.g. illness, international internship), training can take place individually (online by the faculty dean's consent)

## 9. Teaching and learning aids:

1. E-learning course «Management of assets and investment portfolio» discipline:  
<https://elearn.nubip.edu.ua/course/view.php?id=1467>

## 10. Recommended sources of information

1. Zvi Bodie, Alex Kane, Alan J. Marcus. *Investments* (12th ed.). McGraw-Hill Education, 2021. 1080 p.
2. Frank J. Fabozzi. *Portfolio Management: Theory and Practice*. Wiley, 2020. 704 p.
3. Frederick K. Reilly, Keith C. Brown. *Investment Analysis and Portfolio Management* (11th ed.). Cengage Learning, 2021. 1040 p.
4. CFA Institute. *CFA Program Curriculum Level III: Portfolio Management and Wealth Planning*. CFA Institute, 2020. 900 p.
5. CFA Institute Research Foundation. *FinTech and Asset Management*. CFA Institute, 2022. 180 p.
6. Morningstar Inc. *Morningstar Direct: User Guide and Analytics Manual*. Morningstar, 2022. 250 p.
7. Bloomberg L.P. *Bloomberg Market Concepts (BMC)* [Online Course]. Bloomberg, 2023. Approx. 150 p.
8. John C. Hull. *Options, Futures, and Other Derivatives* (11th ed.). Pearson, 2022. 912 p.
9. Jeffrey V. Bailey, Thomas M. Richards, David E. Tierney. *Evaluating Portfolio Performance*. CFA Institute, 2021. 200 p.
10. OECD. *Institutional Investment in Infrastructure: Policy Framework and Best Practices*. OECD Publishing, 2021. 160 p.
11. Anatolii A. Mazaraki, Volodymyr D. Lahutin (Eds.). *Investing*. Kyiv National Economic University, 2022. 356 p.
12. Anatolii M. Moroz, et al. *Financial Markets and Investments*. University of Banking, Kyiv, 2021. 432 p.
13. Tetiana T. Kovalchuk. *Enterprise Asset Management*. Ivan Franko National University of Lviv, 2023. 278 p.
14. Nataliia P. Hrynychuk. *Financial Planning and Portfolio Management*. National Aviation University, Kyiv, 2021. 310 p.
15. Volodymyr M. Sheliudko. *Investment Management*. FinEk Publishing, Kharkiv, 2020. 390 p.
16. Larysa V. Kononenko, Nataliia P. Sysolina, Olena V. Yurchenko. *Accounts Receivable Management: Current State, Problems, and Information Support*. Economic Space, No. 166, 2021. 6 p.
17. Ukrainian Institute of Stock Market Development. *Modern Trends in Portfolio Management in Ukraine*. Kyiv, 2023. 140 p.
18. State Institution “Institute for Economics and Forecasting”. *Financial Instruments in Capital Markets of Ukraine*. Kyiv, 2022. 200 p.
19. Ministry of Finance of Ukraine. *Public Asset Management Strategy 2021–2025*. Kyiv, 2021. 75 p.
20. National Securities and Stock Market Commission (NSSMC). *Report on the State of Investment Activity in Ukraine*. NSSMC, Kyiv, 2022. 96 p.