



SYLLABUS OF THE ACADEMIC DISCIPLINE «Management of innovation and investment activity»

Degree of higher education - Bachelor
Specialty 073 Management
Academic Program “Management”
Academic Year 3, Semester 5,6

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

Lecturer of the academic
discipline
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EEC URL on the
educational portal of
NUBiP of Ukraine

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

COURSE DESCRIPTION

The educational component “Management of innovation and investment activity” belongs to the compulsory disciplines in the specialty Management. The future manager have to deep theoretical knowledge and practical skills using new concepts and tools of innovative and investment management, which gives the study of the discipline.

The purpose of the discipline “Management of innovation and investment activity” is to acquire the necessary theoretical knowledge and practical skills on the conceptual foundations of modern enterprise management based on the latest areas of economic development, namely the introduction of innovation and investment management at the enterprise to achieve its operational and strategic goals.

Competencies

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):

- GC12. Ability to generate new ideas (creativity);
- GC14. Ability to work in an international context.

Special (professional) competencies (SC):

SC2. Ability to analyze the results of an organization's activities and compare them with factors influencing the external and internal environment;

SC12. Ability to analyze and structure organizational problems, form well-founded decisions.

SC16. 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):

PLO4. Demonstrate skills in identifying problems and justifying management decisions;

PLO6. Demonstrate skills in searching, collecting and analyzing information, calculating indicators to justify management decisions;

PLO17. Conduct research individually and/or in a group under the guidance of a leader.

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

STRUCTURE OF THE ACADEMIC DISCIPLINE

Topic	Hours (lectures/ practical classes, seminar)	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	3/3	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 and essays (including in elearn).	PW-5 grades IW -2 grades
Topic 2. Investment market	3/3	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 tests and essays (including in elearn).	PW-5 grades IW -2 grades
Topic 3. Investment resources	3/3	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 tests and essays (including in elearn).	PW-5 grades IW -2 grades

		of the capital investment budget		
Topic 4. Real investments	3/3	Know the economic essence and main forms of real investments. Be able to evaluate real investment objects. Classify investments. Determine sources of financing for real investments.	Execution and delivery of practical, independent work, writing of tests and essays (including in elearn).	PW- 5 grades IW - 2 grades
Topic 5. Financial investments	3/3	Understand the essence of financial investments of the enterprise and know their forms. Assess the cost and profitability of financial investments. Know the main instruments of the domestic stock market.	Execution and delivery of practical, independent work, writing of tests and 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	3/3	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 tests and essays (including in elearn).	PW- 5 grades IW - 2 grades
Topic 7. Management of investment portfolio	3/3	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 tests and essays (including in elearn).	PW- 5 grades IW - 2 grades
Topic 8. Evaluation of the effectiveness of investment decisions	3/3	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	Execution and delivery of practical, independent work, writing of tests and essays (including in elearn).	PW- 5 grades IW - 2 grades

		of attractiveness of the investment market.		
Topic 9. Prospects for achieving economic efficiency of investment activity	3/3	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 tests and essays (including in elearn).	PW- 5 grades IW - 2 grades
Topic 10. International investment activity	3/3	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 tests and essays (including in elearn).	PW-5 grades IW -2 grades
Total for the 5th semester				70
Credit	30/30			30
Total for the semester				100
Semester 6				
Module 2. Management of innovation activity				
Content module 3. Theoretical basis of innovation activity				
Topic 11. The essence of the concept of innovation management	3/3	Know the basic concepts and categories of innovation management. Understand the innovation process model.	Execution and delivery of practical, independent work, writing of tests and essays (including in elearn).	PW- 5 grades IW - 2 grades
Topic 12. Innovation activity as an object of management	3/3	Understand the essence of the concept of “innovation process” and “innovation activity”, its stages at the macro and micro levels. Be able to assess the impact of external and internal environmental factors on innovation activity.	Execution and delivery of practical, independent work, writing of tests and essays (including in elearn).	PW- 5 grades IW – 2 grades
Topic 13. Innovation strategy selection	3/3	Understand the essence and features of innovation strategies. To understand the expediency of choosing a certain type of innovation	Execution and delivery of practical, independent work, writing of	PW- 5 grades IW - 2 grades

		strategy at different stages of the organization's development. To be able to apply methods of substantiation and selection of innovation strategies.	tests and essays (including in elearn).	
Topic 14. Organizational forms of innovation activity	3/3	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 innovation organizations.	Execution and delivery of practical, independent work, writing of tests and essays (including in elearn).	PW- 5 grades IW - 2 grades
Topic 15. Features of innovation investment management	3/3	Know the essence of innovation investments and their importance for the economic development of the enterprise and the country as a whole. Justification of investments in innovation projects and evaluation of their effectiveness. Features of venture capital	Execution and delivery of practical, independent work, writing of tests and essays (including in elearn).	PW- 5 grades IW - 2 grades
Content module 4. Innovation development of enterprise and efficiency of innovation activities determining				
Topic 16. Management of innovation development of organization	3/3	To understand the process of strategic management of innovation development of the organization. Know the strategy of innovations and their classification. To determine the peculiarities of the development, implementation of the innovation strategy.	Execution and delivery of practical, independent work, writing of tests and essays (including in elearn).	PW- 5 grades IW - 2 grades
Topic 17. Technology transfer and its types	3/3	Understand the essence of technology transfer and its types. Know the life cycle of an innovation project. Determine the stages and results of technology transfer.	Execution and delivery of practical, independent work, writing of tests and essays (including in elearn).	PW- 5 grades IW – 2 grades
Topic 18. Evaluation of innovation effectiveness	3/3	Understand the peculiarities of calculating the economic efficiency of innovations. To be aware of the main	Execution and delivery of practical, independent	PW- 5 grades IW – 2 grades

		indicators of the effectiveness of innovative activity. Be able to evaluate and calculate indicators of the efficiency of innovations.	work, writing of tests and essays (including in elearn).	
Topic 19. Innovation risk management	3/3	Know the types of innovation risks and be able to assess their impact on innovation activities. Apply game theory to analyze innovation risks.	Execution and delivery of practical, independent work, writing of tests and essays (including in elearn).	PW- 5 grades IW – 2 grades
Topic 20. Legislative regulation of innovation activity	3/3	Understand the principles and approaches of state support for innovation 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 innovation activities and attracting private investments for the purpose of developing innovation activities.	Execution and delivery of practical, independent work, writing of tests and essays (including in elearn).	PW- 5 grades IW - 2 grades
Total for the 6th semester				70
Exam	30/30			30
Total for the course				100

ASSESSMENT POLICY

<i>Policy regarding deadlines and resits:</i>	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).
<i>Academic honesty policy:</i>	Cheating during tests and exams is prohibited (including using mobile devices). Term papers and essays must have correct references to the literature used
<i>Attendance policy:</i>	Attendance is compulsory. For good reasons (e.g. illness, international internship), training can take place individually (online by the faculty dean's consent)

SCALE FOR ASSESSING THE KNOWLEDGE OF HIGHER EDUCATION STUDENTS

Higher education applicant rating, points	National grade based on exam, credits results	
	exams	credits
90-100	excellent	credited
74-89	good	
60-73	satisfactorily	
0-59	unsatisfactorily	not credited

RECOMMENDED SOURCES OF INFORMATION

1. Державна податкова служба України URL: [http:// www.tax.gov.ua](http://www.tax.gov.ua)
2. Державна служба статистики України. URL: [http:// www.ukrstat.gov.ua](http://www.ukrstat.gov.ua)
3. Деліні, М. М., Цибульська, Е. І., & Григорів, О. О. (2024). Оптимізація фінансово - економічних розрахунків для грантових проєктів у сфері досліджень та інновацій. *Актуальні питання економічних наук*, (5). <https://doi.org/10.5281/zenodo.14021102>
4. Закон України «Про інвестиційну діяльність» від 18.09.1991 р. № 1560-ХІІ (із змінами і доповненнями). Офіційний сайт Верховної Ради України. Електронний ресурс. URL: <http://zakon2.rada.gov.ua/laws/main/1560-12>.
5. 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>.
6. Законодавство України. URL: <https://zakon.rada.gov.ua/>
7. Кабінет Міністрів України. URL: [http:// www.kmu.gov.ua](http://www.kmu.gov.ua)
8. Міністерство економіки України. URL : <https://www.me.gov.ua/?lang=uk-UA>
9. Міністерство фінансів. URL: [http:// www.minfin.gov.ua](http://www.minfin.gov.ua)
10. Шинкарук Л.В., Деліні М.М., Геращенко М.В. (2023) Державна інвестиційна політика підприємств агропромислового сектору в Україні в умовах воєнного стану. *Економіка та суспільство*, (57). <https://doi.org/10.32782/2524-0072/2023-57-89>
11. 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>
12. Afuah, A. (2020). Innovation management-strategies, implementation, and profits. New York, USA: Oxford University Press, 80.

13. 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>
14. Dielini M. Trends in the development of socially responsible investing in the world: theoretical and practical aspects. *Економічний аналіз*. Тернопіль. 2020. Том 30, № 1.
15. Dielini M.M. Peculiarities of the process of non-financial reporting formation in Ukraine. *Economy and forecasting: scientific journal*. 2022. №1. pp. 141-159. DOI : <https://doi.org/10.15407/eip2022.01.141>
16. Dielini M., Vlasenko Yu. Methodical instructions with a synopsis of lectures for independent work and distance learning in the course «Management of innovative and investment activity» (mandatory component of educational program 073 «Management») for students of specialty 073 «Management» educational degree «Bachelor» Kyiv: NULES of Ukraine. 2023. 111 p. URL : https://nubip.edu.ua/sites/default/files/u317/2023_metodichni_vkazivki_u_iid_angl_dielini_0.pdf
17. 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>.
18. Ephreim Matanda (2020). *Modern Financial Investment Management*. Cambridge Scholars Publishing.
19. Frank J. Fabozzi, Sergio M. Focardi & Caroline Jonas (2014) *Investment management: a science to teach or an art to learn?* CFA Institute research foundation.
20. *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>
21. *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.
22. *Principles of investment management for long-term funds*. (2014). URL : <https://www.ctphilanthropy.org/sites/default/files/resources/Principles-of-Investment-Management.pdf>
23. Priscilla Luk and Arpit Gupta, “SPIVA® Japan year-end 2019,” S&P Dow Jones Indices, April 6, 2020.

24. 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).
25. Security analysis and investment management. Lessons 1 to 6. URL : <http://icdeolhpu.org/downloads/course-406FM-02.pdf>.
26. 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)
27. Simkova, T. and Baida, O. (2020), “Formation of the enterprise investment activity management system”, *Efektyvna ekonomika*, vol. 12, URL : <http://www.economy.nayka.com.ua/?op=1&z=8465>
28. Sridhar Natarajan and Michelle F. Davis, “Wall Street return-to-work push finds virus won’t cooperate,” Bloomberg, September 18, 2020.
29. 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>