



## ACADEMIC COURSE SYLLABUS "INVESTMENT ANALYSIS"

**Degree of higher education - Bachelor**

**Specialty 073 Management**

**Academic program "Management"**

**Academic year 3, Semester 5**

**Form of study Full-time ( full-time, part-time)**

**Number of ECTS credits 5**

**Language of training English**

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**Lecturer**

**Kateryna A. Alekseieva, PhD** (Public Administration, As. Professor of Production and Investment Management Department

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**Course page on eLearn**

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<https://elearn.nubip.edu.ua/course/view.php?id=3797>

### ACADEMIC COURSE DESCRIPTION

The educational component "**Investment Analysis**" is optional. The purpose of studying the discipline is a collection of methods and techniques that can be used to develop an effective investment strategy and make investment decisions, justify the feasibility of implementing an investment project and determine the optimal parameters for its implementation in conditions of uncertainty and limited financial resources, and create an optimal investment portfolio.

#### Competencies

- **Integrated competency (IC):** the ability to solve complex specialized problems and practical problems that are characterized by complexity and uncertainty of conditions, in the field of management or in the process training involving the application of theories and methods social and behavioral sciences.

#### **General competencies (GC):**

- GC 3. Ability to abstract thinking, analysis, synthesis
- GC. 10 Ability to conduct research at the relevant levels

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

- SC 2. The ability to analyze the results of the organization's activities, compare them with factors of external and internal influence environment

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

- PLO 3. Demonstrate knowledge of theories, methods and functions of management, modern concepts of leadership
- PLO 5. Describe the content of the functional areas of the organization
- PLO 6 Demonstrate the skills of searching, collecting, analyzing information, calculating indicators for self-justification of management decisions
- PLO 7 Demonstrate organizational projecting skills
- PLO 17 Conduct research individually and/or under the guidance of a leader

## ACADEMIC COURSE STRUCTURE

| Topic   | Hours<br>(lectures/<br>practical<br>classes) | Learning<br>outcomes  | Tasks   | Assessment  |
|---|--|---|---|---|
| <b>Module 1. Investment environment and investment process</b>  |  |   |   |   |
| <b>Topic 1. The essence of investments, direct and indirect investments.</b>                                  | <b>4/4</b>                                   | Know and understand the essence of investments, assets, orient yourself in the types of investments.  | Carrying out and submitting practical, independent work, writing tests (including in elearn). | Practical work – 8 grades<br>Self-study Work – 2 grades |
| <b>Topic 2. Investment environment: investment tools as the first component of the investment environment</b> | <b>4/4</b>                                   | Analyze the investment environment, distinguish between investment means and instruments.   | Carrying out and submitting practical, independent work, writing tests (including in elearn). | Practical work – 8 grades<br>Self-study Work – 2 grades |
| <b>Topic 3. Investment management process</b>   | <b>4/4</b>                                   | To know the investment management procedure and justification of the investment policy.   | Carrying out and submitting practical, independent work, writing tests (including in elearn). | Practical work – 8 grades<br>Self-study Work – 2 grades |
| <b>Module 2. Assessment of investment opportunities</b>   |  |   |   |   |
| <b>Topic 4. Introduction to understanding the time value of money</b>   | <b>4/4</b>                                   | Know the main categories of the topic, understand the essence of the time value of money and apply calculation methods.                                   | Carrying out and submitting practical, independent work, writing tests (including in elearn). | Practical work – 8 grades<br>Self-study Work – 2 grades |
| <b>Topic 5. Finding the present value of a future amount</b>  | <b>4/4</b>                                   | Know the essence of the concepts of "compounding" and "discounting", distinguish between the future value of money and the current value of future money. | Carrying out and submitting practical, independent work, writing tests (including in elearn). | Practical work – 8 grades<br>Self-study Work – 2 grades |

|   |  |   |  |   |
|---|--|---|--|---|
| <b>Topic 6. Investment analysis of the project</b>                    | <b>4/4</b>   | To know the main indicators and calculation methods, according to which the investment attractiveness of the project is analyzed. | Carrying out and submitting practical, independent work, writing tests (including in elearn). Cases studying | Practical work – 8 grades<br>Self-study Work – 2 grades |
| <b>Topic 7. Mutually exclusive alternatives and capital rationing</b> | <b>4/4</b>   | To be able to form alternatives and analyze them.   | Carrying out and submitting practical, independent work, writing tests (including in elearn). Cases studying | Practical work – 3 grades<br>Self-study Work – 2 grades |
| <b>Topic 8. Risk analysis when making investment decisions</b>        | <b>2/2</b>   | Analyze the possibility of risk occurrence and assess its probability when making investment decisions.                           | Carrying out and submitting practical, independent work, writing tests (including in elearn). Cases studying | Practical work – 3 grades<br>Self-study Work – 2 grades |
| <b>Total for the semester</b>   |  |   |  | <b>70</b>   |
| Opportunity to get extra points                                       | Additional points can be achieved for presentation and participation in a student conference, article publication, participation in the 1st round of the olympiads, etc. |   |  | up to 10  |
| <b>Exam</b>   |  |   |  | <b>30</b>   |
| <b>Total</b>  |  |   |  | <b>100</b>  |

### ASSESSMENT POLICY

|   |   |
|---|---|
| <b><i>Policy regarding deadlines and resits</i></b> | 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) |
| <b><i>Academic honesty policy</i></b>               | 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  |
| <b><i>Attendance policy</i></b>                     | 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 APPLICANTS OF HIGHER EDUCATION

|                               |   |                |
|-------------------------------|---|----------------|
| <b>Student rating, points</b> | <b>National grade based on exam results</b> |                |
|                               | <b>exams</b>                                | <b>credits</b> |

|        |                |              |
|--------|----------------|--------------|
| 90-100 | excellent      | credited     |
| 74-89  | good           |              |
| 60-73  | satisfactory   |              |
| 0-59   | unsatisfactory | not credited |

## RECOMMENDED SOURCES OF INFORMATION

1. Алексеева К.А., Слободяник А.М., Цоколь О.П. Обґрунтування інструментів зниження ризиків при здійсненні інвестицій в аграрному секторі. *Вчені записки Таврійського національного університету ім. В.І. Вернадського. Серія: Економіка і управління*. Том 32 (71). №3, 2021. с.32 – 37. URL: <http://dx.doi.org/10.32838/2523-4803/71-3-6>
2. Новаковська І. О., Мединська Н. В., Бавровська Н. М. Інвестиційний аналіз: навчальний посібник. Ч. 1. К.: Видавничий центр НУБіП України, 2024. 323 с. URL: <https://dglib.nubip.edu.ua/handle/123456789/11203>
3. Інвестиційний аналіз: методичні рекомендації до практичних занять. Укладачі: І.С. Смага, І.І. Казімір. Чернівці: Чернівець. нац. ун-т ім. Ю.Федьковича, 2022, 64 с. URL: [https://archer.chnu.edu.ua/bitstream/handle/123456789/5713/%D0%9C%D0%B5%D1%82%D0%BE%D0%B4%D0%B8%D1%87%D0%BA%D0%B0\\_%D1%96%D0%BD%D0%B2%D0%B5%D1%81%D1%82.pdf?sequence=1&isAllowed=y](https://archer.chnu.edu.ua/bitstream/handle/123456789/5713/%D0%9C%D0%B5%D1%82%D0%BE%D0%B4%D0%B8%D1%87%D0%BA%D0%B0_%D1%96%D0%BD%D0%B2%D0%B5%D1%81%D1%82.pdf?sequence=1&isAllowed=y)
4. Про інвестиційну діяльність: Закон України 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>
5. Шинкарук Л.В., Деліні М.М., Суханова А.В., Алексеева К.А. Управління бізнес-проектами: навчальний посібник для студентів зі спеціальності 073 «Менеджмент». Київ: НУБіП, 2021. 325 с. URL: [https://nubip.edu.ua/sites/default/files/u317/2021\\_posibnik\\_ubp.pdf](https://nubip.edu.ua/sites/default/files/u317/2021_posibnik_ubp.pdf)
6. Alekseeva, K.A., Reznik, N.P., Cherkasov, A.V. & Ostapchuk, A.D. (2023) Influence of the Digitalization on Human Development in the Process of Constructing a Welfare Economy. *Lecture Notes in Networks and Systems* 495 LNNS, pp. 885–898. DOI: [https://doi.org/10.1007/978-3-031-08954-1\\_74/](https://doi.org/10.1007/978-3-031-08954-1_74/)
7. Alvarez M., Fridson F. *Financial Statement Analysis: A Practitioner's Guide*. Wiley. John Wiley & Sons, Ltd. 2022. P.425.
8. Coursera. *A Beginner's Guide to Investing*. URL: <https://www.coursera.org/learn/beginners-guide-to-investing-isb>
9. Shynkaruk, L., Alekseeva, K. & Tsokol, O. (2021) Directions of activation of investment activity of small and medium enterprises of the agricultural sector. *Bioeconomics and Agrarian Business*. DOI: 10.31548/bioeconomy2021.01.005. URL: <http://journals.nubip.edu.ua/index.php/Bioeconomy/article/view/15423>
10. Shynkaruk L.V., Dielini M.M., Vlasenko T.O., Dergach A.V. *Investment management: study guide for students of the specialty 073 "Management"*. Kyiv: NULES, 2023. 336 p. URL: [https://nubip.edu.ua/sites/default/files/u317/2023\\_investment\\_management\\_study\\_guide.pdf](https://nubip.edu.ua/sites/default/files/u317/2023_investment_management_study_guide.pdf)