



SYLLABUS OF THE ACADEMIC DISCIPLINE “Asset and investment portfolio management”

Degree of higher education – **Bachelor**
Specialty **073 Management**
Academic program **“Management”**
Academic Year **4**, semester **8**
Form of study **full-time**
Number of ECTS credits **6**
Language of training: **Ukrainian**

Lecturer of the academic discipline

Contact information of the lecturer (e- mail)

EEC URL on the educational portal of NUBiP of Ukraine

Chemodurov O.M., PhD in Economics, Ass. Professor of the Department of Production and Investment Management

o.chemodurov@nubip.edu.ua

<https://elearn.nubip.edu.ua/course/view.php?id=1467>

COURSE DESCRIPTION

(to 1000 printed characters)

The educational component “Asset and Investment Portfolio Management” is optional. The discipline involves revealing the essence and mechanism of investing in assets and investment projects of an enterprise, developing the ability to evaluate and analyze the investment policy implemented in the country, investment portfolios and investment projects. For future specialists, this is an opportunity to form a theoretical and methodological basis for themselves, necessary for the practical use of investment instruments in the implementation of business projects. As a result of studying the educational component, higher education students will master the following competencies:

Acquisition of competencies:

Integral competence (IC) : The ability to solve complex specialized tasks and practical problems, characterized by complexity and uncertainty of conditions, in the field of management or in the learning process, which involves the application of theory and methods of social and behavioral sciences.

General competencies (GC):

GC5. Knowledge and understanding of the subject area and understanding of professional activity.

Special (professional, subject) competencies (SC):

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

SC 3. Ability to determine the prospects for the development of the organization.

SC 4. Ability to identify functional areas of the organization and the relationships between them.

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

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

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

SC 16. 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):

PLO 7. Demonstrate organizational design skills.

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

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

PLO 18. Demonstrate the ability to identify prospects for the development of the enterprise, develop projects , and organize business process management based on an analysis of market opportunities and the international business environment.

STRUCTURE OF THE ACADEMIC DISCIPLINE

Topic	Hours (lectures/laboratory, practical, seminar)	Learning outcomes	Tasks	Assessment
4th year 8th semester				
Module 1. Asset management.				
Topic 1. Foundations of enterprises asset management	4/6	<i>Be able</i> to distinguish between the assets of an enterprise and understand the concept of feasibility studies of projects; <i>Be familiar</i> with domestic legislation regulating entrepreneurial and investment activities; <i>Distinguish</i> the features of developing investments in assets; <i>Apply</i> a project approach to asset management; <i>Be able</i> to effectively manage the company's assets.	Working in groups, individual work, solving tests, independent work of students (including elearn) .	Current, thematic, periodic control: <i>Practical work</i> – 15 points; <i>Tests</i> – 5 points.
Topic 2 Management of current and non-current assets	4/6	<i>Know</i> about types of assets, financial and real investments, as well as the specifics of managing a company's assets; <i>Understand</i> the rationale for the investor's investment in financial and real assets; <i>Use</i> knowledge and skills to form the company's assets, etc.	Handing in practical work. Writing tests, essays, solving cases, working in groups, individual work, solving problems, independent work of students (including elearn).	Current, thematic, periodic control: <i>Practical work</i> – 15 points; <i>Tests</i> – 5 points;
Topic 3. Efficiency management assets	4/6	<i>Be able</i> to assess the effectiveness of assets; <i>Analyze</i> assets and enterprise balance; <i>Understand</i> the features of enterprise's assets formation; <i>Distinguish</i> risks and force majeure circumstances at assets management; <i>Apply</i> teamwork skills. <i>Use</i> analytical sources of information, legislative, regulatory and international analytics etc.	Handing in practical work. Writing tests, essays, solving cases, working in groups, individual work, solving problems, independent work of students (including elearn).	Current, thematic, periodic control: <i>Practical work</i> – 15 points; <i>Tests</i> – 5 points.
Independent work			Essay defense	10
Modular control			Summary test in EEC	30

Module 2. Investment portfolio management.				
Topic 4 Investment project management	4/6	<i>Be able</i> to substantiate the patterns and mechanisms of investment relations between the state, business entities and individuals; <i>Analyze</i> the investment market and risks associated with an investment; <i>Distinguish</i> between risks and force majeure circumstances in investment management; <i>Apply</i> teamwork skills. <i>Use</i> analytical sources of information, legislative, regulatory and international analytics, etc.	Handing in practical work. Writing tests, essays, solving cases, working in groups, individual work, solving problems, independent work of students (including elearn).	Current, thematic, periodic control: <i>Practical work</i> – 15 points; <i>Tests</i> – 5 points.
Topic 5 Investment assessment mechanism	4/6	<i>Understand</i> the basics of investment management; <i>Know</i> about the directions of investment use and the methodology for their evaluation; <i>Be able</i> to form the stages of the company's investment strategy; <i>Know</i> the practice of regulating the interaction of participants in the investment process in Ukraine.	Handing in practical work. Writing tests, essays, solving cases, working in groups, individual work, solving problems, independent work of students (including elearn).	Current, thematic, periodic control: <i>Practical work</i> – 15 points; <i>Tests</i> – 5 points.
Topic 6 System of investment portfolio management	4/6	<i>Apply</i> methods of financial support for investment activities; <i>Use</i> knowledge about the investment portfolio and investment activities; <i>Determine</i> the feasibility for an investor of investing capital in financial and real investments; <i>Be able</i> to develop investment projects, justify the feasibility of their implementation and the effectiveness of management.	Handing in practical work. Writing tests, essays, solving cases, working in groups, individual work, solving problems, independent work of students (including elearn).	Current, thematic, periodic control: <i>Practical work</i> – 15 points; <i>Tests</i> – 5 points.
Independent work			Essay defense	10
Modular control			Summary test in EEC	30
Total by the 8th semester				70
Exam				30
Total by course				100

<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. Butko M. P., Butko I. M., Ditkovska M.Yu. and others. Management of investment activities: a textbook; edited by M.P. Butko . Kyiv: Center Educational Literature , 2018. 480 p.
2. Law of Ukraine "On Investment Activity" dated September 18, 1991 No. 1560-XII (with amendments and supplements). Official website of the Verkhovna Rada of Ukraine. Electronic resource. URL : <http://zakon2.rada.gov.ua/laws/main/1560-12> .
3. Ezekiel Havrenne . Investment Management Code 2018: AlternativeInvestment Funds . Ezekiel Havrenne , 2018.
4. Yashchuk D. L. Research on the methodology of managing current assets of enterprises in times of crisis. *Bulletin of economic transport and industry*. 2018. No. 32. pp. 52–57.
5. Kononenko, L. V., Sysolina , N. P., Yurchenko, O. V. Accounts receivable management: current state, problems, prospects, information support. *Economic Space*, 2021. No. 166. P. 104-109. DOI: <https://doi.org/10.32782/2224-6282/166-18>.
6. Alvarez , T., Sensini , L., & Vazquez , M. Working Capital Management and Profitability : Evidence from an Emergent Economy . *International Journal of Advances in Management and Economics* , 2021. No. 11(1). R. 32-39.
7. Petrovsky P.M. State investment policy in the agricultural sector of Ukraine. *State management studies*. 2019. Vol . 1, No. 11.
8. Gurochkina V. V. Investment policy of the enterprise: stakeholder matrix and drivers of interaction development. *Bulletin of Khmelnytsky National University. Economic Sciences*. 2019. No. 4, Volume 2. Pp. 89–97.
9. World Economic Web Resources (Electronic Economic Library. Contains publications and materials

on various aspects of economics and business, as well as a large number of links to economic journals, websites of relevant associations and institutions) URL: <http://www.management.com.ua/links/goto.php?id=86>.

10. Educational and information portal of NUBiP of Ukraine. URL: <http://elearn.nubip.edu.ua/>. (access date 01.04.2024).

11. National Library of Ukraine named after V.I. Vernadsky URL: <http://www.nbuv.gov.ua> (access date 01.04.2024).