



Lecturer of the course  
Contact information of the  
lecturer (e-mail)  
Course page on eLearn

## COURSE SYLLABUS

### «Investment»

Degree of higher education - Bachelor  
Specialization 072 «Finance, banking and insurance»

Educational programme Corporate finance

Academic year 3, semester 5

Form of study \_\_\_\_\_ (full-time, part-time)

Number of ECTS credits **4**

Language of instruction English (Ukrainian, English, German)

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<https://elearn.nubip.edu.ua/course/view.php?id=3755>

## COURSE DESCRIPTION

(up to 1000 printed characters)

The discipline "Investing" is aimed at studying the enterprise investment behavior and the development of students practical skills to form the estimated cost and budget of the investment project, assess the feasibility and effectiveness of their implementation, choose sources of financing investment operations and optimize their structure, investment risk management.

The course will help students to master the research and provide a scientific basis for rational investment in accordance with the economic policy of the enterprise, region or state as a whole, also to correctly interpret the information obtained for management decisions.

### **Competencies of the educational programme:**

**Integrated competency (IC)** - the ability to solve complex specialized tasks and practical problems in the field of finance, banking and insurance in the course of professional activity or in the process of learning, which involves the application of certain methods and provisions of financial science and is characterized by the uncertainty of conditions and the need to take into account the complex requirements of professional and educational activities .

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

- GC02. Ability to apply knowledge in practical situations.
- GC03. Ability to plan and manage time.
- GC05. Skills in using information and communication technologies.
- GC06. Ability to conduct research at an appropriate level
- GC07. Ability to learn and master modern knowledge.
- GC08. Ability to search, process and analyze information from various sources.
- GC09. The ability to be critical and self-critical.
- GC11. Ability to communicate with representatives of other professions of groups of different levels (with experts from other fields of knowledge/types of economic activity).

#### **Professional (special) competencies (PC):**

PC03. Ability to diagnose the state of financial systems (state finances, including budget and tax systems, finances of economic entities, household finances, financial markets, banking system and insurance).

PC05. Ability to apply knowledge of legislation in the field of monetary, fiscal and financial market regulation.

PC06. Ability to use modern information and software for obtaining and processing data in the field of finance, banking and insurance.

PC07. Ability to compile and analyze financial statements.

PC08. Ability to perform control functions in the field of finance, banking and insurance.

PC10. Ability to determine, justify and take responsibility for professional decisions.

PC11. The ability to maintain an appropriate level of knowledge and constantly improve one's professional training.

**Program learning outcomes (PLO) :**

PLO04. Know the mechanism of functioning of state finances, including budget and tax systems, finances of business entities, household finances, financial markets, banking system and insurance.

PLO05. Possess a methodical toolkit for diagnosing the state of financial systems (state finances, including budget and tax systems, finances of business entities, household finances, financial markets, banking system and insurance).

PLO06. Apply appropriate economic and mathematical methods and models for solving financial problems.

PLO07. Understand the principles, methods and tools of state and market regulation of activities in the field of finance, banking and insurance.

PLO09. Form and analyze financial statements and correctly interpret the received information.

PLO10. Identify sources and understand the methodology of determination and methods of obtaining economic data, collect and analyze the necessary financial information, calculate indicators characterizing the state of financial systems.

PLO11. To have methodical tools for the implementation of control functions in the field of finance, banking and insurance.

PLO12. Use professional argumentation to convey information, ideas, problems and ways to solve them to specialists and non-specialists in the financial sphere of activity.

PLO16. Apply the acquired theoretical knowledge to solve practical problems and meaningfully interpret the obtained results.

PLO17. Identify and plan opportunities for personal professional development.

PLO18. Demonstrate basic creative and critical thinking skills in research and professional communication.

PLO19. Demonstrate the skills of independent work, flexible thinking, openness to new knowledge.

PLO20. Perform functional duties in the group, offer sound financial solutions.

PLO21. To understand the requirements for activity in the specialty, due to the need to ensure the sustainable development of Ukraine, its strengthening as a democratic, social, legal state.

PLO24. Know and be able to identify the investment advantages of economic entities in the agricultural sector.

**COURSE STRUCTURE**

<b>Topic</b>	<b>Hours</b> (lectures / laboratory, practical, seminar)	<b>Learning outcomes</b>	<b>Task</b>	<b>Evaluation</b>
<b>1 semester</b>				
<b>Module 1</b>				
<b>Topic1.</b> Methodological bases of investing	2/2	<b>Know</b> the essence of investment activity and the principles of its organization, participants in the securities market and their functions in the stock market.	Writing texts Systematization of materials in the proposed tables Problem solving Business case	20
<b>Topic 2.</b> Entities and objects of investment activity	2/2	<b>Be able to</b> calculate the future value of securities and deposits. <b>Distinguish</b> the subjects of investment activity by types and forms of ownership, their functions in the investment market.		
<b>Topic 3.</b> Financial investments	3/3	<b>Analyze</b> the investment attractiveness of Ukraine regions by socio-economic indicators.		
<b>Topic 4.</b> Investments in means of production	3/3	<b>Understand</b> measures to use investment as one of the effective levers of economic policy. <b>Apply</b> methods of assessing financial and capital investments in practice.		
<b>Module 2</b>				

<b>Topic 5.</b> Innovative form of investment	2/2	<p><b>Know</b> innovative forms of investment, intellectual property and methods for evaluating the effectiveness of investments.</p> <p><b>Be able to</b> develop a project proposal of the investment project, feasibility study of investment projects, make a business plan of the investment project.</p> <p><b>Use</b> in the future methods of evaluation of investment projects.</p> <p><b>Distinguish</b> forms and types of foreign direct investment.</p> <p><b>Analyze</b> investment projects according to the criteria of payback and profitability.</p> <p><b>Apply</b> methods to evaluate the effectiveness of investments.</p>	<p>Writing tests Systematization of materials in the proposed tables Problem solving Business case</p>	25
<b>Topic 6.</b> Attracting foreign capital	2/3			
<b>Topic 7.</b> Justification of the feasibility of investing	3/3			
<b>Topic 8.</b> Investment projects	3/2			
<b>Module 3</b>				
<b>Topic 8.</b> Investment projects	3/2	<p><b>Know</b> the methods of raising capital, functions and mechanisms of investment management, as well as logistics of the investment project.</p> <p><b>Be able to</b> predict the structure of investment sources, plan the investment strategy of the enterprise.</p> <p><b>Distinguish</b> between financial, operational and general leverage in capital structuring.</p> <p><b>Analyze</b> the cash flow from the investment activities of the enterprise.</p> <p><b>Understand</b> the legal and legislative support of investment entities.</p> <p><b>Apply</b> methods of indicative investment planning in practice.</p>	<p>Writing tests Systematization of materials in the proposed tables Problem solving Business case</p>	25
<b>Topic 10.</b> Investment management	2/3			
<b>Topic 11.</b> Organizational and legal regulation of the investment entities interaction	2/3			
<b>Topic 12.</b> Use of investments	3/2			
<b>Total in 1 semester</b>	<b>30/30</b>			<b>70</b>
<b>Exam</b>				<b>30</b>
<b>Total for the course</b>				<b>100</b>

### ASSESSMENT POLICY

<b><i>Deadline and recompilation policy:</i></b>	Works that are submitted in violation of deadlines without good reason are evaluated at a lower grade. Rearrangement of modules takes place with the permission of the lecturer if there are good reasons (for example, hospital).
<b><i>Academic Integrity Policy:</i></b>	Cheating during tests and exams are prohibited (including the use of mobile devices). Course papers, abstracts must have correct text references to the literature used
<b><i>Visiting policy:</i></b>	Attendance is obligatory. For objective reasons (for example, illness, international internship) studying can be individually (in online form in consultation with 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

1. Davydenko N.M., Skrypnyk G.O. Methodological guidelines for conducting practical and seminar classes in the discipline "Investment" for students of the OS "Bachelor's", specialty 072 "Finance, banking and insurance". K.: Comprint. 2021. 59 p.
2. Electronic educational course in the discipline "Investment".  
<https://elearn.nubip.edu.ua/course/view.php?id=3755>
3. Davydenko N.M., Skrypnyk H.O. Investment. Textbook K.: FOP "V.O. Yamchynskyi", 2021. 460 p.
4. Davydenko N.M. Assessment of the investment attractiveness of the region in terms of modern challenges. Economic Forum. 2017. No. 2. P. 86–92.
5. H.O. Skrypnyk Investment. Manual. 2nd edition add. and processing. K.: CPU "Comprint", 2018. 350 p.
6. Davydenko N.M., Buryak A.V., Skrypnyk H.O. Investment support for the development of the agricultural sector of the economy of Ukraine: monograph. Kyiv: CPU "Comprint", 2017. 388p.
7. H.O. Skrypnyk Activation of investment processes in the regions of Ukraine. Economic Forum, Lutsk National Technical University. 2017. No. 2, pp. 144-151
8. Skrypnyk H.O., Shkuropatska A.I. Financial support of innovative activities in the agricultural sector. Economic studies: a scientific and practical journal, "Helvetika" Publishing House, 2020. No. 3(29) P. 78-83
9. Skrypnyk H.O., Turenok L.V. Financing of innovative projects of the agrarian sector of the economy of Ukraine. Economic studies: a scientific and practical journal. Lviv "Lviv Economic Foundation" 2020. No. (30). P. 124 - 128
10. Financial support of innovative processes in the agricultural sector of Ukraine: theory, methodology and practice: monograph. I.Yu. Dumanska Kyiv: University of Banking, 2018. 298 p.
11. N.Davidenko, H. Skrypnyk, Z. Titenko, O.V. Zhovnirenko. Modeling of the optimum level of financial provision of Ukrainian enterprises' innovative activities. *Global Journal of Environmental Science and Management-GJESM*. SPECIAL ISSUE, 2019.  
[URL:https://www.gjesm.net/article\\_35488.html](https://www.gjesm.net/article_35488.html)
12. N. Davidenko, H. Skrypnyk. Investment strategy of the enterprise and features of its formation in modern conditions. *Scientific journal "Bioeconomy and agrarian business"*. 2022. №3. C3-12 <http://journals.nubip.edu.ua/index.php/Bioeconomy/editor/proofGalley/16556/1463>
13. Economic Code of Ukraine: Law of Ukraine No. 436-17 dated 16.01.2003/ Verkhovna Rada of Ukraine. URL: <http://zakon.rada.gov.ua>
14. Tax Code: Law of Ukraine No. 2856-VI dated 23.12.2010 / Verkhovna Rada of Ukraine. URL: <http://zakon.rada.gov.ua>
15. About investment activity. Law of Ukraine dated September 18, 1991 URL: <http://zakon4.rada.gov.ua>
16. About joint investment institutions (equity and corporate investment funds). Law of Ukraine dated March 15, 2001 N 2299-III. URL: <http://zakon2.rada.gov.ua/laws/show/2299-14>
17. About credit unions. Law of Ukraine dated December 20, 2001 No. 2908-III. URL: <http://zakon0.rada.gov.ua/laws/show/2908-14>
18. Official website of the State Statistics Service of Ukraine. URL: [www.ukrstat.gov.ua/](http://www.ukrstat.gov.ua/)
19. The official website of the National Securities and Stock Market Commission. URL: <https://www.nssmc.gov.ua>