



Syllabus *Investment Management*

Degree of higher education – Master
Field of knowledge 073 Management
Educational and scientific program – *International Management*

Year: I, semester: I

Number of credits: 5 Language of Instruction: English

Course Supervisor

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Course description

The new challenges of the 21st century require specialists with in-depth knowledge of the theory and practice of decision-making in the field of justification of investment strategy when choosing directions and forms of investment, implementation and project financing. In addition, investing takes place in the conditions of globalization, which causes the transfer of capital within foreign markets and justifies the feasibility of using real and financial investment management technologies in practical activities.

Course structure

Hours (lec. /p.c/)	Topic	Learning outcomes	Tasks
2/1	1. The essence, purpose and functions of investment management	Know and be able to explain the essence and principles of investment management, the main directions and motives for its implementation on an international scale	Discussions, tests
2/1	2. Methodological principles and methodological tools of investment management	Understand and substantiate the methodological principles and methodological tools of investment management	Discussions, tests
4/2	3. Evaluation and forecasting of the development of the investment market	Understand and be able to apply assessment methods and methods of forecasting the development of the investment market.	Tests, tasks
2/1	4. Investment strategy of the enterprise	Know the features of the investment strategy of the enterprise.	Tests, tasks
4/1	5. The policy of formation of investment resources of the enterprise	To understand and justify the policy of formation of investment resources of the enterprise	Tests, tasks
2/2	6. Management of real investments of the enterprise	Know the peculiarities and be able to justify the choice of real investments of the enterprise	Tests, cases, tasks
2/2	7. Rules for making investment decisions	Know the rules for making investment decisions	Tests, tasks
4/1	8. Formation of the real investment program of the enterprise	Розуміти особливості формування програми реальних інвестицій підприємства	Tests, tasks
2/1	9. Management features of	Know the features and be able to manage	Tests, cases,

	innovative investments enterprises	innovative investments enterprises	tasks
2/2	10. International investment activity in Ukraine.	To know the main stages and specifics of the preparation, conclusion and execution of contracts in the Foreign Trade, to be able to formulate the main points of the contract of international purchase and sale of goods	Tests, cases, tasks
4/1	11. Portfolio management financial investments of the enterprises	Know the features of portfolio management financial investments of the enterprise	Tests, cases, tasks

Recommended Literature

1. Back, K. (2017). *Asset Pricing and Portfolio Choice Theory*. Oxford University Press Inc, 744 p.
2. Beattie, A. (2020). *Business Forecasting: Understanding the Basics*. Investopedia, 432 p.
4. Beckett-Camarata, J. (2020), *Public-Private Partnerships, Capital Infrastructure Project Investments and Infrastructure Finance*, Emerald Publishing Limited, Bingley, pp. 225-241.
5. Bodie, Zv. (2018). *Investments*. 11th Edition: McGraw Hill, 1041 p.
6. Bubbico, R., Gattini, L., Gereben, Á. etc. (2017). *Wind of change: Investment in Central, Eastern and South Eastern Europe*. European Investment Bank.
7. Campbell, J. (2018). *Financial decisions and markets*. Princeton University Press, 480 p.
9. Green, F. (2021). *How To Make Money in Stocks: A Guide To Stock Market Investing For Beginners To Show That Wealthy People And Hedge Funds Shouldn't Have All The Fun* Paperback, 150 p.
10. Hacızada, M. (2017). *Methods of stimulating foreign investments*. Baku: Azerbaijan State University of Economics UNEC Sabah qrupları, p. 56–58.
11. Hamilton, Ch. (2021). *Stock Market Terminology for Beginners: A Complete Guide to learning the Stock Market Lingo* Paperback, 84 p.
12. Hrebenkov, Y. (2019). *Project substantiation of increasing the efficiency of innovation and investment activity of the enterprise*. Kyiv: KNEU named after Vadym Hetman KNEU, p. 3-6.
14. Mladjenovic, P. (2020). *Stock Investing for Dummies* Paperback, 400 p.
16. Snow, T. (2018). *Investing Quick Start Guide: The Simplified Beginner's Guide to Successfully Navigating the Stock Market, Growing Your Wealth & Creating a Secure Financial Future*, 203 p.
17. Symons, R. (2019). *European common foreign and security policy*. Paris: Legendary, pp. 20-25.
18. Taraniuk, L. (2020). *International investment activity: study guide*. Sumy: Sumy State University, 85 p.
19. *World Investment Report 2022*. World Trade Organization.
20. *World Investment Report 2022*. UNCTAD, 2020. URL: https://unctad.org/system/files/official-document/wir2020_en.pdf.

Assessment policy

- **Deadline and retake policy:** Modules are retaken with the permission of the dean's office if there are good reasons (for example, sick leave).
- **Academic Integrity Policy:** write-offs during control work are prohibited (including using mobile devices).
- **Visiting policy:** Attending classes is a mandatory component of the assessment. For objective reasons (for example, illness, international internship, and other reasons), training can take place online with the permission of the university administration.

Assessment

The final score (on a 100-point scale) in *Investment Management* course is determined as a weighted average value, depending on the specific weight of each credit component.

Credit module 1	Credit module 2	Credit module 3	Credit module 4
20%	20%	20%	40%
1. Class discussions (tests) (topics 1-6) –5 p. per – max. 30 p. 2. Written work – max. 70 p.	1. Class discussions (tests) (topics 7-11) – 6 p. per topic – max. 30 p. 2. Written work – max. 70 p.	1. CPIT preparation – max.40 p. 2. CPIT presentation – max. 40 p. 3. Trainings – max. 20 p.	1. Test (5 items x 25 p.) – max. 25 p.; 2. Open questions – max. 25 p.; 3. Task – max. 50 p.

Assessment Scale

University scale	National Scale	ECTS Scale
90-100	Excellent	A (excellent)
85-89	Good	B (very good)
75-84		C (good)
65-74	Satisfactory	D (satisfactory)
60-64		E (quite satisfactory)
35-59	Unsatisfactory	FX (unsatisfactory with retaking)
1-34		F (unsatisfactory with a revision course)