

## Syllabus of the educational component

### Investments

Subject name	<b>Investments</b>
Higher education level	<b>first (bachelor's degree)</b>
Moodle course webpage	<a href="https://dl2022.khadi-kh.com/course/view.php?id=5089">https://dl2022.khadi-kh.com/course/view.php?id=5089</a>
Volume of the educational component	<b>4 credits (120 hours)</b>
Form of final control	<b>Credit Test</b>
Consultation	<b>according to the schedule</b>
Department name	<b>Economics and Entrepreneurship</b>
Teaching language	<b>English</b>
Head of Course	<b>Kyrchata Iryna, Candidate of Economic Sciences, associate professor</b>
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### Summary of educational component:

**The goal:** formation of a system of theoretical knowledge and practical skills in the field of economic evaluation of investments, necessary for choosing economically desirable and effective investment decisions.

**Subject:** theoretical and practical aspects of economic relations that arise during investment activities of the state, business entities and the population..

### The main tasks of study an academic discipline are:

- awareness of the essence, types and functions of investments;
- determination of indicators for assessing the feasibility of implementing investment projects;
- study of the theoretical and methodological foundations of investment project analysis, their evaluation technique and criteria for choosing an investment strategy;
- mastering the organization of investment project portfolio management;

### Student's competences upon completion of this Course will be:

#### Core competences:

- Ability to abstract thinking, analysis, synthesis;
- Knowledge and understanding of the subject area and understanding of professional activity;
- Ability to apply knowledge in practical situations..

#### Special (professional) competences:

- ability to carry out effective communications in the field of investment activities of business entities;
- ability to determine and substantiate professional decisions in the field of investment activity of business entities; and take responsibility for them;
- the ability to maintain an appropriate level of knowledge and constantly improve their professional training in the field of investment activities of economic entities.

### Program Learning Outcomes:

- understand the principles, methods and tools of state and market regulation of activities in the field of investment activities of economic entities;
- apply the acquired theoretical knowledge to solve practical problems and meaningfully interpret the results obtained;
- own general scientific and special methods of studying economic processes in the field of investment activity of business entities;
- be able to think abstractly, apply analysis and synthesis to identify the key characteristics of financial systems, as well as the behavior of their subjects;
- identify skills of independent work, flexible thinking, openness to new knowledge.

#### Thematic plan

Session	Theme (Lecture Classes (LC), Practical Classes (PC), Individual Work (IW))	Number of hours	
		Full-time learning	Part-time learning
1	LC Economic significance and types of investments	2	2
	PW Forms and types of investments	2	0
	IW Directions of the enterprise's invested activity	12	14
2	LC Investment activity as the basis of economic development	2	2
	PW Investment activity as the basis of economic development	2	0
	IW . Investment process and investment cycle	14	14
3	LC Investment project: concept, project life cycle	2	0
	PW Investment project: concept, project life cycle	2	2
	IW Classification of investment sphere subjects	12	16
4	LC Analysis of investment efficiency	2	0
	PW Analysis of investment efficiency	2	2
	IW Criteria and methods of evaluating investment projects	12	16
5	LC Formation and classification of the investment portfolio	2	0
	PW Methods of securities analysis	2	0
	IW Mechanism of functioning and structure of the investment market	12	18
6	LC Content of the investment project	2	2
	PW Methods of evaluating the effectiveness of investments	2	0
	IW Financing of real investments	14	14
7	LC The main types of portfolio strategies	2	0
	PW The main types of portfolio strategies	2	0
	IW Other types of investment activity	6	9
8	LC Risk management of investment activity	2	0
	PW Economic assessment of investment risks	2	0
	IW Regulation of investment activity	6	9
Total	LC	16	6
	PW (LW, IT)	16	4
	IW	88	110

**Individual educational and research task:** not provided.

#### Methods of learning:

- 1) verbal:
  - 1.1 traditional: lectures, explanations, stories;
  - 1.2 interactive (non-traditional): problem lectures, discussions, etc.;
- 2) visual: the method of illustrations, the method of demonstrations;
- 3) practical:
  - 3.1 traditional: practical classes, seminars;

3.2 interactive (non-traditional): business games, trainings, seminars discussions, "round table", analysis of real problems, brainstorming method.

**Grade policy:**

**Formative Assessment**

1. The current success of applicants for the performance of educational types of work in training sessions and for the performance of independent work tasks is evaluated using a four-point rating scale with subsequent transfer to a 100-point scale. During the evaluation of the current academic performance, all types of work stipulated in the training program are taken into account.

1.1 Lecture classes are evaluated by determining the quality of performance of specified tasks.

1.2 Practical classes are evaluated by the quality of performance of a control or individual task, performance and design of practical work.

1.3 Seminar classes are evaluated by the quality of the performance of an individual task/abstract.

2. Evaluation of the current performance of higher education applicants is carried out at each practical session on a four-point scale ("5", "4", "3", "2") and entered in the log of academic performance:

- «excellent»: the applicant flawlessly mastered the theoretical material, demonstrates in-depth knowledge of the relevant topic or academic discipline, the main provisions;

- «good»: the applicant has mastered the theoretical material well, possesses the main aspects from primary sources and recommended literature, presents it in a reasoned manner; has practical skills, expresses his thoughts on certain problems, but certain inaccuracies and errors are assumed in the logic of the presentation of theoretical content or in the analysis of practical material;

- «satisfactory»: the applicant has mainly acquired theoretical knowledge of the educational topic or discipline, orients himself in primary sources and recommended literature, but answers unconvincingly, confuses concepts, answers additional questions uncertainly, does not have stable knowledge; when answering questions of a practical nature, reveals inaccuracy in knowledge, does not know how to evaluate facts and phenomena, connect them with the future profession;

- «unsatisfactory»: the applicant has not mastered the educational material of the topic (discipline), does not know scientific facts, definitions, hardly orients himself in primary sources and recommended literature, lacks scientific thinking, practical skills are not formed.

3. The final score for the current activity is recognized as the arithmetic mean sum of points for each lesson, for individual work, current control works according to the formula:

$$K_{current} = (K_1 + K_2 + \dots + K_n) / n$$

where  $K_{current}$  – final evaluation of success based on the results of current control;

$K_1, K_2, \dots, K_n$  – evaluation of the success of the current control measure;

$n$  – number of measures of current control. Grades are converted into points according to the calculation scale (table 1).

Grades are converted into points according to the calculation scale (table 1).

**Table 1 – Recalculation of the average grade for the current activity into a multipoint scale**

4- point scale	100- point scale	4- point scale	100- point scale	4- point scale	100- point scale	4- point scale	100- point scale
5	100	4,45	89	3,90	78	3,35	67
4,95	99	4,4	88	3,85	77	3,3	66
4,9	98	4,35	87	3,80	76	3,25	65
4,85	97	4,3	86	3,75	75	3,2	64
4,8	96	4,25	85	3,7	74	3,15	63
4,75	95	4,20	84	3,65	73	3,1	62
4,7	94	4,15	83	3,60	72	3,05	61
4,65	93	4,10	82	3,55	71	3	60
4,6	92	4,05	81	3,5	70	from 1.78 to 2,99	from 35 to 59
						re-compilation	
4,55	91	4,00	80	3,45	69	from 0 to 1,77	from 0 to 34
4,5	90	3,95	79	3,4	68	repeated stud	

### **Summative Assessment**

1. An applicant of higher education receives a credit in the last lesson in the discipline based on the results of the current evaluation. The average score for the current activity is converted into points on a 100-point scale, according to the conversion table (table 1).

Applicants of higher education who have an average current score in the discipline lower than "3" (60 points) can increase their current score in the last session by taking tests in the discipline.

Evaluation of knowledge of applicants by means of testing is carried out according to a scale:

- «Excellent»: not less than 90% of correct answers;
- «Very good»: from 82% to 89% of correct answers;
- «Good»: from 74% to 81% of correct answers; – «Satisfactory»: from 67% to 73% of correct answers;
- «Satisfactory enough»: from 60% to 66% of correct answers; – «Unsatisfactory»: less than 60% of correct answers.

2. The conditions for receiving a credit are: – making up all missed lessons; – average current grade in the discipline not lower than "3" (60 points).

3. For performing individual independent work and participating in scientific events, applicants are awarded additional points.

3.1 Additional points are added to the sum of points scored by the student of higher education for the current educational activity.

3.2 The number of additional points awarded for different types of individual tasks depends on their volume and importance:

- prize places in the discipline at the international / all-Ukrainian competition of scientific student works – 20 points;
- prize places in the discipline at the all-Ukrainian olympiads – 20 points;
- participation in the international / all-Ukrainian competition of scientific student works – 15 points;
- participation in international / all-Ukrainian scientific conferences of students and young scientists – 12 points;
- participation in all-Ukrainian olympiads in the discipline – 10 points; – participation in olympiads and scientific conferences of the KhNAHU in the discipline – 5 points;
- performance of individual scientific and research (educational and research) tasks of increased complexity – 5 points.

3.3 The amount of additional points may not exceed 20 points. 4 The learning result is evaluated: – on a two-point scale (passed/failed) according to Table 2; – on a 100-point scale according to Table 2.

Table 2 – The scale for evaluating the knowledge of students based on the results of the final control of the academic discipline

Score in points	Evaluation according to the ECTS scale		
	Evaluation	Criteria	
	Credit test		
<b>90–100</b>	Credited	<b>A</b>	The theoretical content of the course is fully mastered, without gaps, the necessary practical skills for working with the mastered material are formed, all educational tasks stipulated in the training program have been completed, the quality of their performance was evaluated with a number of points close to the maximum
<b>80–89</b>		<b>B</b>	The theoretical content of the course is fully mastered, without gaps, the necessary practical skills for working with the mastered material are mainly formed, all educational tasks stipulated in the training program have been completed, the quality of performance of most of them was evaluated with a number of points close to the maximum
<b>75–79</b>		<b>C</b>	The theoretical content of the course is fully mastered, without gaps, some practical skills of working with the mastered material are insufficiently formed, all educational tasks stipulated in the training program have been completed, the quality of performance of none of them has been evaluated with the minimum number of points, some types of tasks have been completed with errors
<b>67–74</b>		<b>D</b>	The theoretical content of the course is partially mastered, but the gaps are not of a significant nature, the necessary practical skills for working with the mastered material are basically formed, most of the educational tasks stipulated in the training program have been completed, some of the completed tasks may contain errors
<b>60–66</b>		<b>E</b>	The theoretical content of the course is partially mastered, some practical work skills have not been formed, many educational tasks stipulated in the training program have not been completed, or the quality of some of them has been evaluated with a number of points close to the minimum.
<b>35–59</b>	No Credited	<b>FX</b>	The theoretical content of the course is partially mastered, the necessary practical work skills have not been formed, most of the educational tasks stipulated in the training program have not been completed, or the quality of their performance has been evaluated with a number of points close to the minimum; with additional independent work on the course material, it is possible to improve the quality of the performance of educational tasks (with the possibility of re-compilation)
<b>0–34</b>		<b>F</b>	The theoretical content of the course has not been mastered, the necessary practical work skills have not been formed, all completed educational tasks contain gross errors, additional independent work on the course material will not lead to any significant improvement in the quality of the performance of educational tasks (with a mandatory repeat course)

**Course policy:**

- the course involves working in a team where the environment is friendly, creative, open to constructive criticism;
- mastering the discipline involves mandatory attendance at lectures and practical classes, as well as independent work;
- independent work involves the study of certain topics of the discipline that are made in accordance with the program for independent processing, or were considered briefly, providing answers to theoretical questions and test tasks;
- all the tasks stipulated in the training program must be completed in due time/
- if the student is absent from the classes for good reason, he or she presents the tasks completed during the independent preparation and consultation of the teacher;

– while studying the course, students must adhere to the rules of academic integrity set forth in the following documents: "Rules of academic integrity of participants in the educational process of the KhNAHU" ([https://www.khadi.kharkov.ua/fileadmin/P\\_Standart/pologeniya/stvnz\\_67\\_01\\_do\\_broch\\_1.pdf](https://www.khadi.kharkov.ua/fileadmin/P_Standart/pologeniya/stvnz_67_01_do_broch_1.pdf)), "Academic integrity. Checking the text of academic, scientific and qualification papers for plagiarism" ([https://www.khadi.kharkov.ua/fileadmin/P\\_Standart/pologeniya/stvnz\\_85\\_1\\_01.pdf](https://www.khadi.kharkov.ua/fileadmin/P_Standart/pologeniya/stvnz_85_1_01.pdf)), "The moral and ethical code of participants of the educational process of the KhNAHU" ([https://www.khadi.kharkov.ua/fileadmin/P\\_Standart/pologeniya/stvnz\\_67\\_01\\_MEK\\_1.pdf](https://www.khadi.kharkov.ua/fileadmin/P_Standart/pologeniya/stvnz_67_01_MEK_1.pdf)).

– in the case of detection of plagiarism, the applicant receives 0 points for the task and must re-perform the tasks provided for in the syllabus; – write-offs during control work are prohibited (including using mobile devices). Mobile devices are allowed to be used only during online testing./

#### **Recommended literature:**

1. Investment [Text] : textbook / V. Fedorenko , M. Czapka ; Univ. of econ. and administration in Blytom. - 2nd ed., rev. and updated. - Kyiv : Alerta, 2011. - 377 p. : fig. - 100 прим. - ISBN 978-617-566-022-5 (Alerta). - ISBN 978-83-88587-39-9 (University of economics and administration in Bytom)
2. Investment management [Text] / S. Shkarlet, I. Remnova, Kh. Shtyrhun ; Chernihiv nat. univ. of technology, Project "English for universities" . - Chernihiv : CNUT, 2017.- 200 p.
3. Investment: theory and practice [Text] / Svitlana Gutkevych ; Nat. univ. of food technologies. - 2nd ed. - Szczecin : [National univ. of food technologies], 2016. - 195 p.
4. Менеджмент інвестиційної діяльності : підручник / Бутко М.П. та ін. ; за заг.ред. М.П. Бутка. Київ. : Центр учбової літератури, 2018. 480 с.
5. Петухова О.М. Інвестування : навч. посіб. : для студентів ВНЗ. Київ: Центручбової літератури, 2018. 335 с.
6. Скрипник Г.О. Інвестування. Посібник. 2-ге вид. доп. і перероб. Київ: ЦП «Компринт», 2018. 350 с.

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