



Syllabus Course Program



INVESTMENT ANALYSIS

Specialty

072 – Finance, banking, insurance and the stock market

Educational program

Finance and Banking

Level of education

Bachelor's level

Semester

8

Institute

Institute of Education and Science in Economics, Management and International Business

Department

Accounting and Finance(205)

Course type

Professional training (selective),

Language of instruction

English,

Lecturers and course developers



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Doctor of Economic Sciences, Professor, Professor of the Department of Accounting and Finance of NTU "KhPI"

Author of more than 180 scientific and educational and methodological works. Leading lecturer in the disciplines: "Analysis of economic activity", "Economic analysis", "Fundamentals of scientific research", "Investment analysis"

More about the lecturer on the department's website

<http://web.kpi.kharkov.ua/eaiu/pro-kafedru/profesorov-ko-vikladats-kij-sklad/kolyesnichenko-anastasiya-sergiyivna/>

General information

Summary

The "Investment Analysis" course is aimed at developing the knowledge and skills necessary for investment analysis. During the training, applicants will learn how to organize and conduct an investment analysis; master the tools and methods of investment analysis. Studying the course is based on understanding the concepts of investment and investment activity. The course also helps applicants understand the place and value of investment analysis in the information provision of users of accounting and analytical information when solving problems in the field of social, economic and environmental responsibility of the enterprise, as well as when making decisions about investment projects based on analytical information.

Course objectives and goals

Formation of theoretical knowledge and practical skills of investment analysis

Format of classes

Lectures, practical classes, consultations. Calculation task. Final control in the form of an exam.

Competencies

GC 01. Ability to abstract thinking, analysis and synthesis.

GC 08. Ability to search, process and analyze information from various sources

GC 12. Ability to work autonomously.

SC13 The ability to organize the development and implementation of innovative financial technologies and tools of the stock market, based on knowledge of its functioning in conditions of digitalization, followed by effective management of financial assets based on investment analysis.

Learning outcomes

LO14. Be able to think abstractly, apply analysis and synthesis to identify the key characteristics of financial systems, as well as the peculiarities of the behavior of their subjects.

LO19. Demonstrate the skills of independent work, flexible thinking, openness to new knowledge.

LO25. To be able to analyze the development trends of the functional and technological components of the infrastructure of the stock market and the peculiarities of the organization of investment in innovation, to manage classic and innovative financial assets based on investment analysis.

Student workload

The total volume of the course is 180 hours (6ECTS credits): Lectures - 30 hours, workshops - 30 hours, self-study-120 hours.

Course prerequisites

To successfully pass the course, you need to have knowledge and practical skills in the following disciplines: "Enterprise finance", "Financial analysis", "Investment".

Features of the course, teaching and learning methods, and technologies

Lectures are conducted interactively using multimedia technologies. Practical classes use a project approach to learning, game methods, and focus on the use of information technologies when conducting investment analysis. Study materials are available to students through Teams and Google Classroom.

Program of the course

Topics of the lectures

Topic 1. Theoretical foundations and organization of investment analysis at the enterprise

Topic 2. Investment activity of the enterprise as an object of analysis

Topic 3. Analysis of design and estimate documentation

Topic 4. Analysis of the technical and economic justification of the investment project

Topic 5. Budgeting and analysis of cash flows of an investment project

Topic 6. Methods of evaluating investment projects

Topic 7. Assessment of investment attractiveness of projects

Topic 8. Financial and investment analysis of business entities

Topic 9. Investment portfolio analysis

Topic 10. Investment risks: analysis and assessment

Topics of the workshops

Topic 1. Theoretical foundations and organization of investment analysis at the enterprise

Topic 2. Investment activity of the enterprise as an object of analysis

Topic 3. Analysis of design and estimate documentation

Topic 4. Analysis of the technical and economic justification of the investment project

Topic 5. Budgeting and analysis of cash flows of an investment project

Topic 6. Methods of evaluating investment projects

Topic 7. Assessment of investment attractiveness of projects

Topic 8. Financial and investment analysis of business entities

Topic 9. Investment portfolio analysis

Topic 10. Investment risks: analysis and assessment

Topics of the laboratory classes

no laboratory classes.

Self-study

The course involves the implementation of a calculation task. Students are recommended additional materials (methodical instructions) for its implementation

Course materials and recommended reading

1. Advances in Investment Analysis and Portfolio Management. 1st Edition, Volume 7 - December 20, 2000. Editor: Cheng-Few Lee. <https://shop.elsevier.com/books/advances-in-investment-analysis-and-portfolio-management/lee/978-0-7623-0658-9>
2. Investment Analysis. https://bawar.net/data0/books/5ea61c95954c8/pdf/Investment_Analysis_and_Portfolio_Management.pdf
3. Iershova N., Portna, O., Tretyak V., Moskalenko JI., Vasyliiev O. Crisis Management: Innovative Financial and Accounting Technologies. TEM Journal. 2021. 10(2).
4. Koutoupis, Andreas & Davidopoulos, Leonidas. (2023). Handbook of Investment Analysis, Portfolio Management, and Financial Derivatives.
5. Investments: Analysis and Management, 14th Edition. Gerald R. Jensen, Charles P. Jones. 2019. 672 p.
6. Investment Analysis. <https://www.routledge.com/Investment-Analysis-An-Introduction-to-Portfolio-Theory-and-Management/Dempsey/p/book/978113838874>
7. Investment Analysis <https://strategiccco.com/articles/profitability/investment-analysis/>.
8. Investment Analysis <https://www.needl.ai/blog/mastering-investment-analysis-a-guide-for-analysts>
9. Investment Analysis <https://coresignal.com/blog/investment-analysis/>

Assessment and grading

Criteria for assessment of student performance, and the final score structure

The final grade for the academic discipline is defined as the sum of grades/points for all successfully assessed learning outcomes during the semester: performance of 2 module works (20% each), performance of the calculation task - 20%; activity and effectiveness of the applicant's work during classroom classes (40%).

The exam is written and contains: 2 theoretical questions and 1 practical task (40%).

Grading scale

Total points	National	ECTS
90-100	Excellent	A
82-89	Good	B
75-81	Good	C
64-74	Satisfactory	D
60-63	Satisfactory	E
35-59	Unsatisfactory (requires additional learning)	FX
1-34	Unsatisfactory (requires repetition of the course)	F

Norms of academic integrity and course policy

The student must adhere to the Code of Ethics of Academic Relations and Integrity of NTU "KhPI": to demonstrate discipline, good manners, kindness, honesty, and responsibility. Conflict situations should be openly discussed in academic groups with a lecturer, and if it is impossible to resolve the conflict, they should be brought to the attention of the Institute's management.

Regulatory and legal documents related to the implementation of the principles of academic integrity at NTU "KhPI" are available on the website: <http://blogs.kpi.kharkov.ua/v2/nv/akademichna-dobrochesnist/>

Approval

Approved by

Date, signature

Head of the department

Course title



National Technical University
"Kharkiv Polytechnic Institute"

Oleksandr MANOYLENKO

Date, signature

Guarantor of the educational
program
Maryna Shevchenko

Course title



National Technical University
"Kharkiv Polytechnic Institute"