



Syllabus Course Program



Investment capital management

Specialty

072 – Finance, Banking, Insurance and Stock Market

Educational program

Finance and Banking

Level of education

Master's level

Semester

2

Institute

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

Department

Accounting and Finance (205)

Course type

Optional

Language of instruction

English

Lecturers and course developers

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PhD in Economic Sciences, Associate Professor, Associate Professor of Department of Accounting and Finance

Authored and co-authored over 200 scientific and methodological publications. Senior lecturer of courses "Investment capital management"

[Learn more about the teacher on the department's website](#)

General information

Summary

The discipline covers key concepts and subsystems in the field of studying investment activities and innovations. Mastering the content of the discipline by students will allow them to reveal the essence and features of modern economic practice in managing investment capital for making managerial decisions.

Course objectives and goals

The purpose of the discipline "Investment capital management" is To form and consolidate in future specialists modern economic thinking in the field of management of investment activities of enterprises, which requires mastering the basic theoretical principles and mastering the necessary practical skills that should ensure its effectiveness

Format of classes

Lectures, workshops, consultations, self-study. Individual task is in a form of Control Work. Test is the form of final control.

Competencies

- GC 1. Ability to think abstractly, analyze, and synthesize.
- GC 3. Ability to conduct sound research.
- GC 4. Ability to identify, state, and solve problems.
- GC 5. Ability to make informed decisions.

PC 1. Ability to use the fundamental laws of development of finance, banking, and insurance in combination with research and management tools for professional and academic activities.
PC 3. Ability to apply management skills in finance, banking, and insurance.
PC 7. The ability to search, use, and interpret information is necessary for solving professional and academic problems in finance, banking, and insurance.

Learning outcomes

LO01. To apply fundamental laws of finance, banking, and insurance development in combination with research and management tools for professional and academic activities.
LO04. To search, process, systematize, and analyze information necessary for solving professional and academic problems in finance, banking, and insurance.
LO06. To present research results in an accessible and reasoned manner orally and in writing, to participate in professional discussions.
LO09. To apply management skills in finance, banking, and insurance.
LO11. To apply in-depth knowledge in financial, banking, and insurance management decision-making.
LO12. To justify the choice of management decision options in finance, banking, and insurance and evaluate their effectiveness, considering the goals, existing constraints, and legal and ethical aspects.
LO13. To assess the degree of task complexity at the planning and results processing stages.

Student workload

The total volume of the course is 120 hours (4 ECTS credits): Lectures - 32 hours, workshops - 16 hours, self-study - 72 hours.

Course prerequisites

Successful completion of the course requires knowledge and practical skills in the following disciplines: Financial management, Insurance management, Banking management.

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

Interactive lectures with presentations, discussions, workshops, individual and team work, research work, work with literature and information sources, problem-based learning.

Program of the course

Topics of the lectures

Topic 1. Theoretical principles of investment capital management

The concept of investment and investment activity of an enterprise. The essence of investment capital management and related concepts. Characteristics of investment capital management as a scientific direction

Topic 2. State regulation of investment activity

State regulation of investment activity: concepts and principles. International experience of state regulation of investment activity

Topic 3. Methodological tools of investment capital management

Substantiation of approaches to a comprehensive analysis of capital investments. Basic methods and indicators for assessing the effectiveness of investment capital management

Topic 4. Information provision of investment capital management

The essence of information support for innovative and investment activity of an enterprise. Accounting and information support for investment capital

Topic 5. Assessment and development trends of the investment market

The concept of the investment market. Classification of types and segments of the investment market. Methods of current observation of the investment market situation. Methods of analysis of the current investment market situation. Main trends in the development of the investment market

Topic 6. Investment resources management policy of the enterprise

The concept of enterprise investment resources, classification, forms of involvement. Tasks and main stages of developing a policy for forming enterprise investment resources. Methodological principles for

developing a policy for forming enterprise investment resources. Determining the general need for investment resources

Topic 7. Formation of the investment strategy of the enterprise

The essence and types of enterprise investment strategies. Basic principles and conditions for forming an enterprise investment strategy

Topic 8. Formation of the real investment program of the enterprise

The procedure for forming an enterprise investment program. Model for forming an enterprise investment program

Topic 9. Fundamentals of investment risk management

The concept of investment risk and its legal assessment. Features of investment risk management

Topic 10. Management of innovative investments of the enterprise

The concept of innovative investments of an enterprise and the characteristics of their main forms. Management of innovative investments of an enterprise as a tool for implementing an innovation strategy. State regulation of innovation activity

Topics of the workshops

Topic 1. Theoretical principles of investment capital management

Topic 2. State regulation of investment activity

Topic 3. Methodological tools of investment capital management

Topic 4. Information provision of investment capital management

Topic 5. Assessment and development trends of the investment market

Topic 6. Investment resources management policy of the enterprise

Topic 7. Formation of the investment strategy of the enterprise

Topic 8. Formation of the real investment program of the enterprise

Topic 9. Fundamentals of investment risk management

Topic 10. Management of innovative investments of the enterprise

Topics of the laboratory classes

no laboratory classes.

Self-study

Processing of lecture materials. Review of literary sources and Internet resources on the topics of the discipline. Analytical review of scientific literature on the disclosure of theoretical and methodological principles of investment capital of the enterprise and its management. Completion of current assessment tasks (20%), in particular: preparation of reports and presentations for the seminar; writing independent works; development of one's own investment program based on the analysis of real program passports, active work in practical classes. Completion of an individual task in the form of a test (20%). Preparation for the tasks of the current semester control (20%) and the final test (40%). The procedure and requirements for completing an individual task are set out in the methodological instructions for completing an individual task in the discipline.

Course materials and recommended reading

1. Ippolito, R. (2020). Private Capital Investing: The Handbook of Private Debt and Private Equity. 1st Edition. Wiley Finance.
2. Coleman, L. (2019) New Principles of Equity Investment. Emerald Group Publishing.
- McKellar, J. (2023). Infrastructure as Business The Role of Private Investment Capital. New York. Routledge.
3. Mauboussin, Michael J., & Rappaport, A. (2021). Expectations Investing: Reading Stock Prices for Better Returns, Revised and Updated. Columbia Business School Publishing.
4. Power System Assets - Investment, Management, Methods and Practices (2022). Springer. 428 p.
- Frank J. Fabozzi, & Pamela Peterson Drake (2009). Finance: Capital Markets, Financial Management, and Investment Management 1st Edition. Wiley.
5. Dr. F. C. Sharma, & Dr. R. S. Kulshrestha (2021). Financial & Investment Management. SBPD Publications.

6. Shakti Singh (2020). Investment management. Maharshi Dayanand University Press. 72 p.
7. Mauboussin, Michael J., & Callahan, D. (2022). Return on Invested Capital, Morgan Stanley, URL: https://www.morganstanley.com/im/publication/insights/articles/article_returnoninvestedcapital.pdf
8. Rustagi, R.P. (2023). Investment Management. Theory & Practice. Sultan Chand & Sons.
9. Faisal, S. M., & Khan, M.S. (2011). Capital Market and Investment Management. Laxmi Publications.
10. Ronald, N. Kahn (2018). The future of investment management. CFA Institute Research Foundation.
11. Koliesnichenko A. S., Bilgen S. The Theoretical Aspects of the Company's Capital Structure. Business Inform. 2023. No. 10. pp. 232-239.

Assessment and grading

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

100% of the final grade consists of assessment results in the form of: performance of an individual task in the form of a Control Work (20%); final control work (40%) and the student's self-study (40%).

40% of student's self-study consists of:

- 20% of the current assessment (including reports at the seminar, independent works and work in practical classes);
- 20% of the current semester control (theoretical questions and practical tasks).

The Test is carried out in writing and contains:

2 theoretical questions of different difficulty levels and 1 practical task.

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
Oleksandr MANOYLENKO

Date, signature

Guarantor of the educational program
Tetiana NAZAROVA