

INVESTMENT

COURSE SYLLABUS

Code and name of specialty	073 – Management	Institute	Institute of Education and Science in Economics, Management and International Business
Program name	Management of organizations and administration	Department	Management
Type of program	Educational and Professional	Language of instruction	English

LECTURER

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DSc (Economics), Professor, Director of Institute of Education and Science in Economics, Management and International Business (NTU “KhPI”)
Authored and co-authored over 200 scientific publications. Courses: Management 5 (Performance management), Introduction to specialty (Management), Business valuation, Business planning

GENERAL DESCRIPTION OF THE COURSE

Summary	The course covers the theoretical and practical applications of investments. Students will review various approaches to the use and valuation of investment objects (assets and financial instruments). The course is lecture based. Lectures will consist of covering the theory, examples, and class discussion. Homework assignments will focus on applying the material from lectures.					
Course objectives	<ul style="list-style-type: none"> to provide students with a framework for making financial decisions related to investments to enhance students' capacity for developing rational investor objectives, based on personal needs and best practices to deepen students' understanding of the structure of global financial markets, why they exist and how they work, and be able to see how they impact our daily lives 					
Types of classes and control	Lectures, workshops, consultations. The course ends with a final exam					
Term	6					

Student workload (credits) / Type of course	5 / ELECTIVE	Lectures (hours)	24	Workshops (hours)	12	Self-study (hours)	114
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Program competences

GC04. The ability to apply knowledge in practical situations
 GC08. Skills of information and communication technology usage
 GC12. The ability to generate new ideas (creativity).
 SC02. The ability to analyze the results of organization activity, to compare them with the factors of the external and internal environment.
 SC03. The ability to identify prospects of organization development
 SC08. The ability to plan the organization activity and to manage the time
 SC02.2. The ability to identify areas of investment and justify the effectiveness of real and financial investments
 SSC2.3. To understand the principles and methods of business evaluation and to use them in professional activities

Learning outcomes	Teaching and learning methods	Forms of assessment (continuous assessment CAS, final assessment FAS)
LO06. To show skills of search, collecting and analysis of information, calculation of indicators to substantiate management decisions	Interactive lectures with presentations, discussions, workshops, individual and teamwork	Practical assessment (CAS), online tests (CAS), final online test (FAS)
LO07. To show skills of organizational planning	Interactive lectures with presentations, discussions, workshops, teamwork	Peer small group presentations (CAS), online tests (CAS), practical assessment (CAS), final online test (FAS)
PO 12. To evaluate the legal, social, and economic implications of an organization's functioning	Discussions, workshops, teamwork, case-based learning, student-peer feedback, problem-based learning, case-based learning	Peer small group presentations (CAS), online tests (CAS), practical assessment (CAS), final online test (FAS)
LO16. To demonstrate skills of independent work, flexible thinking, openness to new knowledge, be critical and self-critical	Discussions, workshops, individual and teamwork, case-based learning, problem-based learning	Peer small group presentations (CAS), online tests (CAS), practical assessment (CAS), final online test (FAS)

ASSESSMENT AND GRADING

Ranges of points corresponding to grades	score (points) for all types of learning activities	ECTS grading scale	The national grading scale	Allocation of grade points	100% Final assessment as a result of Final test (40%) and Continuous assessment (60%). 40% Final test: class test 60% Continuous assessment: <ul style="list-style-type: none">• 40% practical assessment;• 20% mid-term control (2 online tests)
	90-100	A	excellent		
	82-89	B	good		
	74-81	C			
	64-73	D	satisfactory		
	60-63	E			
	35-59	FX	Unsatisfactory (with the exam retake option)		
	0-34	F	Unsatisfactory (with mandatory repetition of the course)		

Course policy

Students are expected to attend classes regularly, to get to class on time and stay for the duration of the class. In the case of absence, students will be required to submit all assignments to make up for the missed classes. Students are also expected to come to class having read all the required material and being ready to productively participate in the class discussions. Written assignments should be submitted before the specified deadlines.

COURSE STRUCTURE AND CONTENT

Lecture 1	Theoretical basis of investment	Workshop 1	Business Ideas, Crowdfunding and ICO	Self-study	Comparing crowdfunding platforms, reading suggested literature
Lecture 2	Investment entities and investment objects		Card game “Private and institutional investors”. Investment trends		Reading suggested literature. Preparing a review on investment in disruptive technologies
Lecture 3	Investment market	Workshop 2	Case study “Facebook or Snapchat?”		Evaluating the investment attractiveness of Facebook and Snapchat (group assignment). Comparing countries based on the Doing Business Ranking
Lecture 4-5	Methodological bases and tools of investment	Workshop 3	Practical assignments “Time value of money. Risk and return” Evaluating investment needs		Reading suggested literature, making calculations
Lecture 6	Capital Investment				
Lecture 7-8	Portfolio Investment	Workshop 4	Strategic Investment assessment worksheets		Reading suggested literature, online test
Lecture 9-10	Investment appraisal	Workshop 5	Investment Appraisal assignments (calculation tasks, group decision-making activity).		Reading suggested literature, making calculations, card sorting online activity, online testing “Investment calculations & tools”
Lecture 11-12	Investment resources	Workshop 6	Final test		Reading suggested literature, preparing for the final test

RECOMMENDED READING

Compulsory	<ol style="list-style-type: none"> Investments, Bodie, Kane & Marcus (BKM) (2014). (10th edition, McGraw Hill Irwin. Damodaran, A. (2002). Investment valuation : Tools and Techniques for Determining the Value of Any Asset / A. Damodaran. New York : John Wiley & Sons, Inc., Rubinstein, M. (2006). A History of the Theory of Investments. New Jersey : Wiley. Sharp, W., Bailey, J., Alexander, G. (1998). Investments. Prentice Hall. Fedorenko, V., Czapka, M. (2011). Investment . K. : Alerta. 	Additional	<ol style="list-style-type: none"> Вовчак, О. Д. (2006). Інвестування. Львів: «Новий світ – 2000». Гриньова, В. М., Коюда, В.О., Лепейко, Т.І., Коюда О.П. (2008). Інвестування. К.: Знання. Омелянович, Л. О. (Ред.). (2012). Інвестування. Київ. Graham, B., Zveig, J., Baffet, W. (2006). The Intelligent Investor: The Definitive Book on Value Investing. A Book of Practical Counsel. Cunningham, L. (2013) The Essays of Warren Buffett: Lessons for Investors and Managers.

Academic integrity

students are expected to adhere to the Code of Ethics of Academic Relations and Integrity" of NTU "KhPI".

The content of this syllabus is consistent with the course program.