

Bila Tserkva National Agrarian University
Faculty of Economics
Department of Finance, Banking and Insurance

	<p>SYLLABUS OF THE EDUCATIONAL DISCIPLINE «INVESTMENT ANALYSIS» Field of knowledge – C «Social sciences, journalism, information and international relations» Specialty – C1 «Economics and international economic relations» Specialization – C1.01 «Economics» Educational program «Economics»</p>
Level of higher education	first (undergraduate)
Component of the educational program:	selective
Number of ECTS credits / total number of hours	4 credits / 120 hours
Semester	7
Form of control	test
Language of teaching	english
<p>Profile of the teacher</p> 	<p>Tkachenko Kateryna Position: Associate Professor of the Department of Finance, Banking and Insurance Academic rank: associate professor Scientific degree: candidate of economic sciences Workplace: educational building No. 4 (Soborna Square, 8/1), room 130. (department of finance, banking and insurance). E-mail: ktkachenko@btsau.edu.ua Communication with the teacher: according to the consultation schedule</p>
Description of the discipline	<p>The discipline «Investment analysis» belongs to the selective component of the educational program, and aims to form students' theoretical and practical knowledge in the field of investment analysis and evaluation of project implementation in order to develop competencies regarding the importance of investments in economic life.</p> <p>The tasks of the discipline are the study of the theoretical foundations of investment activity, the organization of investment activity, methodological tools of investment analysis for making managerial decisions regarding investment projects in industrial and social infrastructure, taking into account the requirements of standards, the requirements of authorities and local self-government, economic policy measures.</p>
Prerequisites for studying the	The elective discipline «Investment Analysis» is based on knowledge of such disciplines as «Investment», «Micro- and Macroeconomics», «Finance».

discipline	
The purpose of studying the discipline	The purpose of studying the discipline «Investment Analysis» is to acquire theoretical knowledge and practical skills for analyzing the feasibility of implementing investment projects.
Format of discipline	<p><i>For full-time study</i>, the discipline is taught in a face-to-face format using multimedia tools. If necessary (individual schedules, distance learning), Moodle, ZOOM platforms can be used. The format of teaching the discipline is mixed: a combination of traditional forms of learning with elements of distance learning.</p> <p><i>For part-time study</i>, the discipline is taught in a format combining independent student work and sessional classes. Students work through the main volume of material independently using the provided methodological recommendations, textbooks and electronic resources. During the study sessions, introductory lectures, practical and consulting classes are held, where key topics of the course are considered and applied tasks are performed. To support the educational process, electronic educational platforms (Moodle, ZOOM, etc.) are actively used, which provides the possibility of remote consultations, checking individual tasks and intermediate knowledge control. The format of teaching the discipline is mixed: it involves a combination of independent study of educational material with elements of remote interaction between the teacher and the student during the session.</p>
Competencies according to the Standard of Higher Education in the specialty «Economics»	<p>Studying the discipline «Investment analysis» should ensure that higher education students acquire the following general and special competencies:</p> <p>GC 4. Ability to apply knowledge in practical situations.</p> <p>GC 6. Ability to communicate in a foreign language.</p> <p>GC 11. Ability to make informed decisions.</p> <p>GC 12. Interpersonal skills.</p> <p>GC 13. Ability to act socially, responsibly and consciously.</p> <p>SC 6. Ability to apply economic and mathematical methods and models to solve economic problems.</p>
Expected learning outcomes	<p>PLO 6. Use professional argumentation to convey information, ideas, problems and solutions to specialists and non-specialists in the field of economic activity.</p> <p>PLO 8. Apply appropriate economic and mathematical methods and models to solve economic problems.</p> <p>PLO 12. Apply acquired knowledge to solve practical problems and meaningfully interpret the obtained results.</p>
Course structure	<p style="text-align: center;"><i>Content module 1. Methodology of investment analysis</i></p> <p>Topic 1.1. Concept and essence of investment analysis</p> <p>Topic 1.2. Project analysis in investment activity</p> <p>Topic 1.3. Financial investments</p> <p>Topic 1.4. Investment project development technology and its components</p> <p>Topic 1.5. Real investment projects</p> <p>Topic 1.6. Evaluation of financial resources in investing</p> <p>Topic 1.7. Financial investment tools</p> <p style="text-align: center;"><i>Content module 2. Functional aspects of project analysis in the field of real investment and financial investment management</i></p> <p>Topic 2.1. Analysis and forecasting of the company's financial condition and assessment of its investment attractiveness</p>

	<p>Topic 2.2. Analysis of the commercial activity of the project</p> <p>Topic 2.3. Evaluation of the estimated efficiency of the project</p> <p>Topic 2.4. Determination of investment risk of the project</p> <p>Topic 2.5. Analysis of the production plan of the project</p> <p>Topic 2.6. Analysis of social aspects of the project</p> <p>Topic 2.7. Organization of project management</p>												
Teaching methods	<p>During the lecture course, slide presentations in the Microsoft Office Power Point program, video presentations, handouts, and discussion of problematic issues are used.</p> <p>During practical classes, applicants solve typical problems related to their further professional activities. Practical classes are held in classrooms with the use of methodical, informational and legal documentation, technical teaching aids (multimedia equipment) under the guidance of a teacher. The following methods of active learning are used in the course of practical classes: reproductive method; problem execution method; partial search (heuristic) method; research method.</p> <p>When performing individual educational and research tasks (writing essays and calculation tasks), as well as when performing independent work, a research method is used to comply with the requirements of academic integrity.</p>												
Forms of control	<p>Current control in the discipline "Investment Analysis" includes thematic assessment and modular control. Thematic assessment of classroom and independent work of students is carried out on the basis of current grades received by them for oral and written answers on the subject, independent, practical and test work. Current control of the implementation of the INDZ is carried out in accordance with the task schedule.</p> <p>Modular control is carried out in the form of a test or computer testing.</p> <p>The number of points received for each type of educational work for different forms of current control is displayed to students in the electronic journal after each control event. The final control of students' educational activities is carried out in the form of a test based on the results of current control (thematic assessment, independent work, INDZ and modular control) and does not require the mandatory presence of students.</p> <p>The test results are published in the electronic journal of the academic group before the start of the examination session.</p>												
Types of control and evaluation criteria	<p>Lecture classes are not assessed. During lecture classes, the presence of applicants is recorded to monitor class attendance. Students receive a grade for practical classes for completed calculation tasks, case analysis, team projects, reports, presentations, essays, critical reviews of scientific publications, and activity during discussions.</p> <p>During module control, the means of assessment is a written test.</p> <p>During final control, the means of assessing the results of learning in the discipline are standardized computer tests.</p> <p style="text-align: center;">Distribution of points assigned to higher education applicants for the final control «credit»</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th>Types of work</th> <th>Practical classes</th> <th>Independent work</th> <th>Modules and control</th> <th>Individual work</th> <th>Total score</th> </tr> </thead> <tbody> <tr> <td>Maximum possible number of points</td> <td style="text-align: center;">30</td> <td style="text-align: center;">30</td> <td style="text-align: center;">30</td> <td style="text-align: center;">10</td> <td style="text-align: center;">100</td> </tr> </tbody> </table>	Types of work	Practical classes	Independent work	Modules and control	Individual work	Total score	Maximum possible number of points	30	30	30	10	100
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Success scale of higher education applicants

For 100-point scale	According to the scale ECTS	On a national scale	
		Exam	test
90-100	A	Perfectly	Enrolled
82-89	B	Fine	
75-81	C	Satisfactorily	
64-74	D		
60-63	E		
35-59	FX	Unsatisfactory (failed) with the possibility of retaking	
1-34	F	Unsatisfactory (credited) with mandatory repeated study	

Policy

Academic Integrity Policy: Students’ written work is expected to be their original research or reasoning. Any evidence of academic dishonesty in a student’s written work (copying, lack of references, fabrication, falsification, deception) is grounds for the instructor to disqualify the student from the course. The Academic Integrity Policy at Bila Tserkva National Agrarian University is available on the university’s website
https://btsau.edu.ua/sites/default/files/Faculties/osvita/normatyvne/polog_akad_dobr_bnau.pdf

Attendance Policy: Students are expected to attend all lectures and practical classes of the course. Students must inform the instructor of their inability to attend classes. Missed classes are to be made up according to the instructor’s consultation schedule. For objective reasons, online learning may be provided.

Deadline and Resubmission Policy: Students must adhere to the deadlines for completing all types of work.

Policy on task performance: responsibility, diligence, creativity are positively assessed.

Assessment policy: assessment tools and criteria are prescribed in the work program of the discipline, posted on the E-learning platform of the Bila Tserkva National University (Moodle).

Recommended sources of information

Basic literature

- Brealey, Richard A., Stewart C., Myers, and Franklin Allen. (2020). Principles of Corporate Finance. 13th ed. McGraw-Hill Education, 960 p.
- Ross, Stephen A., Randolph W. (2019). Westerfield, and Jeffrey Jaffe. Corporate Finance. 12th ed. McGraw-Hill Education, 1152 p.
- Bodie, Zvi, Alex Kane, and Alan J. (2021). Marcus. Investments. 12th ed. McGraw-Hill Education, 912 p.
- Tjia, James. (2020). Quantitative Investment Portfolio Analytics in R: An Introduction to R for Modeling Portfolio Risk and Return. Wiley, 304 p.
- Fabozzi, Frank J. (2016). Handbook of Investment Management. Wiley, 608 p.

Additional literature

- Tkachenko K.V., Paska I.M., Grinchuk Y.S., Radko V.I. (2021). Substantiation of the strategy of innovation-oriented development of agricultural enterprises for milk production. Collection of scientific works «Economics and management of the agricultural industry»: BNAU. No. 1. Pp. 179–190. URL: <https://rep.btsau.edu.ua/handle/BNAU/6092>
- Lupenko Yu., Kopytets N., Voloshyn V., Varchenko O., Tkachenko K. (2022). Quality of poultry meat as a basis of export potential of meat products. *IOP Conf. Series: Earth and Environmental Science*. Volume 949, 012020. URL: https://www.researchgate.net/publication/357917098_Quality_of_poultry_meat_as_a_ba

[sis of export potential of the meat products](#)

3. Krysanov, D., Tkachenko, K., Varchenko, O. (2023). Innovative activity and economic efficiency of the food industry enterprises of Ukraine. In: Vector European, nr. 2, Pp. 98-107. ISSN 2345-1106. DOI: <https://doi.org/10.52507/2345-1106.2023-2.21> URL: <https://rep.btsau.edu.ua/handle/BNAU/12990>

4. Shust, O. A., Varchenko, O. M., Krysanov, D. F., Dragan, O. O., Tkachenko, K. V., & Varchenko, O. O. (2024). Modern trends in the development of plant production under agrarian crises. *Agricultural Science and Practice*, 10 (3), Pp. 16-34. URL: <http://rep.btsau.edu.ua/handle/BNAU/11985>

5. Varchenko, O., Varchenko, O., Dragan, O., Tkachenko, K., Rybak, N., & Zubchenko, V. (2024). «Green Finance» in the Post-War Reconstruction of Ukraine: Organizational and Financial Aspects. *Financial and Credit Activity Problems of Theory and Practice*, 3(56), 75–85. URL: <http://rep.btsau.edu.ua/handle/BNAU/12980>

Information resources

1. Educational and information portal of BNAU Moodle. URL: <https://teach.btsau.net.ua/>
2. Scientific library of BNAU. URL: <https://library.btsau.edu.ua/>
3. Institutional repository of BNAU: URL: <https://rep.btsau.edu.ua/>