

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

	SYLLABUS OF THE EDUCATIONAL DISCIPLINE «INVESTMENT ANALYSIS» Field of knowledge -Management and administration Specialty - Entrepreneurship and trade Educational program Entrepreneurship, trade and stock exchange activities
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
Profile of the teacher 	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
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 discipline	The elective discipline «Investment Analysis» is based on knowledge of such disciplines as «Investment», «Micro- and Macroeconomics», «Finance».
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	<i>For full-time study, the discipline is taught in a face-to-face format using</i>

	<p>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>
<p>Competencies according to the Standard of Higher Education in the specialty «Economics»</p>	<p>Studying the discipline «Investment analysis» should ensure that higher education students acquire the following general and special competencies:</p> <p>GC 1. Ability to abstract thinking, analysis and synthesis. GC 2. Ability to apply the acquired knowledge in practical situations. GC 4. Ability to communicate in a foreign language. GC 6. Ability to search, process and analyze information from various sources. SC 1. Critical understanding of the theoretical foundations of entrepreneurial and commercial activities. SC 2. Ability to choose and use appropriate methods and tools to substantiate decisions regarding the creation and functioning of entrepreneurial and commercial structures. SC 5. Ability to determine and evaluate the characteristics of goods and services in entrepreneurial and commercial activities.</p>
<p>Expected learning outcomes</p>	<p>PLO 1. Use basic knowledge of entrepreneurship and trade and the skills of critical thinking, analysis and synthesis for professional purposes. PLO 2. Apply the acquired knowledge to identify, formulate and solve problems in various practical situations in entrepreneurial and trade activities. PLO 3. Have skills in written and oral professional communication in the state and foreign languages. PLO 5. Organize the search, independent selection, high-quality processing of information from various sources to form data banks in the field of entrepreneurship and trade.</p>
<p>Course structure</p>	<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 Topic 1.2. Project analysis in investment activity Topic 1.3. Financial investments Topic 1.4. Investment project development technology and its components Topic 1.5. Real investment projects Topic 1.6. Evaluation of financial resources in investing 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>
Policy	<p>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</p> <p>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.</p> <p>Deadline and Resubmission Policy: Students must adhere to the deadlines for completing all types of work.</p> <p>Policy on task performance: responsibility, diligence, creativity are positively assessed.</p> <p>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).</p>

Recommended sources of information**Basic literature**

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

Additional literature

1. 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>
2. 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_basis_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/>