MINISTRY OF SCIENCE AND HIGHER EDUCATION OF THE RUSSIAN FEDERATION

Federal State Budgetary Educational Institution of Higher Education

«SAINT-PETERSBURG STATE UNIVERSITY OF ECONOMICS» (UNECON)

|  |  |
| --- | --- |
|  | APPROVED  Vice-rector for educational activities  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Veronika.G. Shubaeva  «\_\_\_\_» \_\_\_\_\_\_\_\_\_\_\_\_\_\_ 20\_\_\_\_. |

***Инвестиционный менеджмент / Investments***

**Syllabus of the course**

|  |  |
| --- | --- |
| Specialty | *38.03.02 Management* |
| Specialization | *Business management and digital innovations* |
| Level of higher education | *Bachelor* |
| Form of training | *Full-time* |
| Year of enrolment | *2024* |

Authored by:

|  |
| --- |
| PhD, Olga Panfilova |

|  |  |  |  |
| --- | --- | --- | --- |
| Total number of hours | 108 | **Form of final attestation:**   |  | | --- | | Test: semester 6 | |
| incl: |  |
| contact work | 56 |
| self-study | 52 |
| practical training | 0 |
| control hours | 0 |

**Hours distribution:**

|  |  |
| --- | --- |
| Semester: | 6 |
| Type of classes | Hours |
| Lecture classes | 32 |
| Practical training | 24 |
| Laboratory work |  |
| **Total contact hours** | **56** |
| Self-study | 52 |
| Control hours | 0 |
| **Total academic hours** | **108** |
| **Total credits** | **3** |

Saint-Petersburg

2024

**CONTENTS**

[**1. LEARNING OBJECTIVES** 3](#_Toc149912634)

[**2. COURSE PLACE IN THE PROGRAMME STRUCTURE** 3](#_Toc149912635)

[**3. EXPECTED LEARNING OUTCOMES** 3](#_Toc149912636)

[**4. COURSE STRUCTURE AND CONTENT** 3](#_Toc149912637)

[**5. TEACHING AND LEARNING TOOLS OF THE COURSE** 4](#_Toc149912638)

[**5.1 Recommended literature** 4](#_Toc149912639)

[**5.2 List of software (including national production)** 4](#_Toc149912640)

[**5.3 List of reference systems and modern professional databases** 4](#_Toc149912641)

[**6. TECHNICAL FACILITIES** 5](#_Toc149912642)

[**7. METHODOLOGICAL GUIDELINES FOR STUDENTS** 6](#_Toc149912643)

[**8. SPECIFICATIONS FOR TEACHING DISABLED PERSONS** 7](#_Toc149912644)

[**ASSESSMENT RESOURSES** 8](#_Toc149912645)

[**1.1 Control tasks and assignments for interim attestation** 8](#_Toc149912646)

[**1.2 Topics of written works** 8](#_Toc149912647)

[**1.3 Control points** 8](#_Toc149912648)

[**1.4 Other evaluation objects** 8](#_Toc149912649)

[**1.5 Independent work of the student** 8](#_Toc149912650)

[**1.6 Grading scale** 8](#_Toc149912651)

# **1. LEARNING OBJECTIVES**

|  |  |
| --- | --- |
| **Objective:** | Formation of students ' theoretical and applied competencies that allow them to develop and analyze investment projects implemented by real sector enterprises, timely exit inefficient projects and make informed management decisions on the implementation, participation or exit of investment projects. |

# **2. COURSE PLACE IN THE PROGRAMME STRUCTURE**

The discipline B1.V. Investments is a part of Block 1.

# **3. EXPECTED LEARNING OUTCOMES**

| **Code and name of the graduate's competence** | **Code and name of the competence achievement indicator** | **Planned results of training in the discipline** |
| --- | --- | --- |
| PC-1 – Is able to form possible solutions based on the target indicators developed for them | PC-1.3 – Determines connections and dependencies between elements of business analysis information | To know: approaches to determining connections and dependencies between elements of business analysis information  To be able to: identify relationships and dependencies between elements of business analysis information.  To possess: tools for identifying and determining the relationship and dependence between elements of business analysis information. |

# **4.** **COURSE STRUCTURE AND CONTENT**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Number and name of topics and / or sections / topics** | **Content of the discipline** | | **Academic hours** | | | | |
| **Contact work** | | | | **Self-study** |
| **Lectures** | | **Practices** | **Workshops** |
| Topic 1. Investment activity of corporations | Features of investment and investment activity in the real sector. The market of resources for financing the investment activity of enterprises and corporations, traditional participants. Features of the tools used to finance projects. | | 6 | | 4 |  | 10 |
| Topic 2. Financial planning and investment modeling | The cost of capital as a determining factor in the implementation of investment projects. Methods for evaluating the effectiveness of projects. Modern approaches to investment process management. | | 8 | | 6 |  | 20 |
| Topic 3. Managing the financial result of investment activities | Approaches to forecasting and evaluating the financial result of projects. Features of formation and evaluation of the financial result of projects in the energy sector. | | 10 | | 8 |  | 12 |
| Topic 4. Risk management of investment financing | Sources of risks in the financing of investment projects. Financial consequences of project termination. Methods of risk minimization. | | 8 | | 6 |  | 10 |
| **Control:** | | | | | | | **0** |
| **Total by discipline:** | | **32** | | **24** | | **0** | **52** |

# **5. TEACHING AND LEARNING TOOLS OF THE COURSE**

## **5.1 Recommended literature**

|  |  |
| --- | --- |
| **Bibliographic description of the publication (author, title, type, place and year of publication, number of pages)** | **Electronic resources** |
| Panfilova, Olga Vyacheslavovna. Investment design : a textbook / O. V. Panfilova; Ministry of Education and Science of the Russian Federation. Russian Federation, St.PetersburgState Economy. un-t, Institute of Magistracy. SaintPetersburg: SPbSEU Publishing House, 2017. | http:/ / opac.unecon.ru / elibrary ... B2%D0%B0%D0%BD%D0%B8%D0%B5. pdf |
| Panfilova, Olga Vyacheslavovna. Praktika proektnogo finansirovaniya i investitsionnoe modelirovanie : uchebnoe posobie [Practice of project financing and investment modeling: a textbook]. education grew. Russian Federation, St.PetersburgState Economy. un-t, Institute of Magistracy. SaintPetersburg: SPbSEU Publishing House, 2020. 1 file (2.44,44 MB). | http://opac.unecon.ru/elibrary ... 82%D0%BD%D0%BE%D0%B3%D0%BE.pdf |

## **5.2 List of software (including national production)**

|  |
| --- |
| - 7-Zip |
| - LibreOffice |
| - ОС Альт образование 10 |

## **5.3 List of reference systems and modern professional databases**

|  |  |
| --- | --- |
| **№** | **Name of reference systems and professional databases** |
| 1. | Digital library Grebennikon.ru – [www.grebennikon.ru](http://www.grebennikon.ru) |
| 2. | Science Digital Library eLIBRARRY – [www.elibrary.ru](https://elibrary.ru/defaultx.asp?) |
| 3. | Science Digital Library КиберЛеника – [www.cyberleninka.ru](https://cyberleninka.ru/) |
| 4. | Database ПОЛПРЕД Справочники – [www.polpred.com](http://www.polpred.com) |
| 5. | Database OECD Books, Papers & Statistics on the platform OECD iLibrary  [www.oecd-ilibrary.org](http://www.oecd-ilibrary.org) |
| 6. | Legal reference system КонсультантПлюс (installed resource UNECON or [www.consultant.ru](https://www.consultant.ru/)) |
| 7. | Legal reference system «ГАРАНТ» (installed resource UNECON or [www.garant.ru](https://www.garant.ru/)) |
| 8. | Information and referral system «Кодекс» (installed resource UNECON or [www.kodeks.ru](https://kodeks.ru/)) |
| 9. | Digital library system BOOK.ru - [www.book.ru](https://book.ru/) |
| 10. | Digital library system ЭБС ЮРАЙТ – [www.urait.ru](https://urait.ru/viewer/kompleksnyy-analiz-hozyaystvennoy-deyatelnosti-468686) |
| 11. | Digital library system ЗНАНИУМ (ZNANIUM) – [www.znanium.com](http://www.znanium.com) |
| 12. | Digital library UNECON – [opac.unecon.ru](https://opac.unecon.ru/) |

# **6. TECHNICAL FACILITIES**

There are special rooms for lectures, seminars, coursework, group and individual consultations, current and interim assessments, as well as rooms for self-study.

The premises are equipped with equipment and teaching aids.

The rooms for students' independent work are equipped with computers with Internet connection and access to the university's electronic learning environment.

|  |  |
| --- | --- |
| **Name of classroom** | **Сlassroom location** |
| Classroom 2009 Training classroom (for lecture- and seminar-type classes, coursework, group and individual consultations, current control and intermediate attestation), equipped with a multimedia system. Special furniture and equipment: Educational furniture for 122 seats (study table 61 pcs., chairs 122 pcs.), the teacher's workplace, desk m/m, drawer 1 pc, chalk board 1 pc (3 sections), chair 1 pc, drawer 1 pc, chair 1 pc, Chair 2 pcs., Intel i3-2100 2.4 Ghz /4Gb/500Gb/Acer V193 19" - 1 pc, Sound projector Yamaha YSP-3000 - 1 pc, Projector stand with camera decks - 1 pc, Projection screen draper - 1 pc, Multimedia projector Type 2 Panasonic PT-VX610E - 1 pc, Screen Media D1 ceiling bracket - 1 pc. Sets of display equipment and visual aids: multimedia applications for lecture courses and practical sessions, interactive teaching and visual aids. | 191023, St. Petersburg, Griboedova canal, 30-32, lit. A, Б, P |
| Classroom 2011 Training classroom (for lecture- and seminar-type classes, coursework, group and individual consultations, current control and intermediate attestation), equipped with a multimedia system. Specialized furniture and equipment: Educational furniture for 118 seats, teacher's workplace, desk - 1 pc, chalk board (3 sections) - 1 pc, marker board - 1 pc, desk - 1 pc, desk - 1 pc, drawer - 1 pc, chair - 3 pcs., Computer Intel i3-2100 2.4 Ghz /4Gb/500Gb/Acer V193 19" - 1 pc, ScreenMedia Champion 244x183cm SCM-4304 - 1 pc, Panasonic PT-VX610E multimedia projector - 1 pc. Sets of display equipment and visual aids: multimedia applications for lecture courses and practical sessions, interactive teaching and visual aids. | 191023, St. Petersburg, Griboedova canal, 30-32, lit. A, Б, P |
| Classroom 2028 Training classroom (for lecture- and seminar-type classes, coursework, group and individual consultations, current control and intermediate attestation), equipped with a multimedia system. Specialized furniture and equipment: Educational furniture for 44 seats, teacher's workplace, chalk board (one section) - 1 pc, chair - 1 pc, table - 1 pc, chair - 3 pcs. Portable multimedia set: HP 250 G6 1WY58EA laptop, LG PF1500G multimedia projector. Sets of display equipment and visual aids: multimedia applications for lecture courses and practical sessions, interactive teaching and visual aids. | 191023, St. Petersburg, Griboedova canal, 30-32, lit. A, Б, P |
| Classroom 2045 Training classroom (for lecture- and seminar-type classes, coursework, group and individual consultations, current control and intermediate attestation), equipped with a multimedia system. Specialized furniture and equipment: Educational furniture for 78 seats, teacher's workplace, chalk board (3 sections) - 1 pc, chair - 1 pc, chairs - 2 pcs. Portable multimedia set: HP 250 G6 1WY58EA laptop, LG PF1500G multimedia projector. Sets of display equipment and visual aids: multimedia applications for lecture courses and practical sessions, interactive teaching and visual aids. | 191023, St. Petersburg, Griboedova canal, 30-32, lit. A, Б, P |
| Classroom 2052 Training classroom (for lecture- and seminar-type classes, coursework, group and individual consultations, current control and intermediate attestation), equipped with a multimedia system. Specialized furniture and equipment: Educational furniture for 88 seats, teacher's workplace, chalk board (3 sections) - 1 pc, desk - 1 pc, table - 2 pcs, chair - 2 pcs, Computer Intel i3-2100 2.4 Ghz/500/4/Acer V193 19" - 1 pc, Multimedia projector Type 2 Panasonic PT-VX610E - 1 pc, ScreenMedia Champion 244x183cm SCM-4304 motorized screen - 1 pc, MW Cinerollo 200\*200cm manual spring loaded screen - 1 pc, Multimedia projector Type 2 Panasonic PT-VX610E - 1 pc. Sets of display equipment and visual aids: multimedia applications for lecture courses and practical sessions, interactive teaching and visual aids. | 191023, St. Petersburg, Griboedova canal, 30-32, lit. A, Б, P |
| Classroom 2060 Training classroom (for lecture- and seminar-type classes, coursework, group and individual consultations, current control and intermediate attestation), equipped with a multimedia system. Specialized furniture and equipment: Educational furniture for 82 seats, a teacher's workplace, chalk board (3 sections) - 1 pc., chair - 1 pc., table - 1 pc., chair - 2 pcs., Computer Intel i3-2100 2.4 Ghz/500/4/Acer V193 19" - 1 pc., Multimedia projector Panasonic PT-VX610E - 1 pc., Screen with electric drive ScreenMedia Champion 203x153cm (SCM-4303) - 1 pc. Sets of display equipment and visual aids: multimedia applications for lecture courses and practical sessions, interactive teaching and visual aids. | 191023, St. Petersburg, Griboedova canal, 30-32, lit. A, Б, P |
| Classroom 2061 Training classroom (for lecture- and seminar-type classes, coursework, group and individual consultations, current control and intermediate attestation), equipped with a multimedia system. Specialized furniture and equipment: Educational furniture for 80 seats, teacher's workplace, table - 1 pc, chalk board (3 sections) - 1 pc, pulpit - 1 pc, chairs - 2 pcs. Portable multimedia set: HP 250 G6 1WY58EA laptop, LG PF1500G multimedia projector. Sets of display equipment and visual aids: multimedia applications for lecture courses and practical sessions, interactive teaching and visual aids. | 191023, St. Petersburg, Griboedova canal, 30-32, lit. A, Б, P |
| Classroom 2023 Computer room (for practical classes, course design (coursework) using computer technology), equipped with a multimedia system. Specialized furniture and equipment: Educational furniture for 48 seats, teacher's workplace (computer desk - 1 pc.), wheeled marker board - 1 pc, 3 sectional marker board - 1 pc, desk - 1 pc, iso chair - 7 pcs, chair -1 pc, blinds - 3 pcs., Computer i5-8400/8GB/500GB\_SSD/Viewsonic VA2410-mh -34 pcs, Switchboard Cisco Catalyst 2960-48PST-L (including SmartNet Service Contract CON-SNT-2964STL) - 1 pc, Wi-Fi Access Point Type1 UBIQUITI UAP-AC-PRO - 1 pc, NEC M350 X projector - 1 pc, Local Area Network Switch (48 ports) Cisco WS-C2960+48PST-L - 1 pc, ProCurve Switch 2626 - 1 pc, Intel pentium x2 g3250 computer /500gb / philips 21.5' monitor - 1 pc, Ubiquiti IP video camera - 1 pc, Wireless access point/UNI FI AP PRO/Ubiquiti - 1 pc. Sets of display equipment and visual aids: multimedia applications for lecture courses and practical sessions, interactive teaching and visual aids. | 191023, St. Petersburg, Griboedova canal, 30-32, lit. A, Б, P |
| Classroom 2034 Computer room (for practical classes, course design (coursework) using computer technology), equipped with a multimedia system. Specialized furniture and equipment: Educational furniture for 25 seats, teacher's workplace (table 1pc., chair 1pc.), marker board 1pc, Rack hanger 2pcs, chairs 3pcs.Computer I5-7400/8Gb/1Tb/DELL S2218H - 21pcs, Network switch Cisco WS-C2960-48TT-L (Catalyst2960) 48-ports 10/100Mbps+2p - 1 pc, Switchboard Cisco Catalyst 2960 24 WS-C2960-24PC-L - 1 pc. Sets of display equipment and visual aids: multimedia applications for lecture courses and practical sessions, interactive teaching and visual aids. | 191023, St. Petersburg, Griboedova canal, 30-32, lit. A, Б, P |

# **7. METHODOLOGICAL GUIDELINES FOR STUDENTS**

The following documents should be made available to the trainee before the start of the course:

* training and methodological documentation;
* local normative acts regulating the main issues of the organisation and implementation of educational activities, including those regulating the procedure for current monitoring and interim assessment of students;
* the schedule of consultations of the teaching staff.

The level and depth of mastering the discipline is determined by the active and systematic work of students in lectures, seminars, independent work, including in terms of identifying the most significant and relevant problems for further study. A special condition for qualitative mastering of the discipline is an effective organisation of work, which allows distributing the academic workload evenly in accordance with the schedule of the educational process.

When preparing for classes, students have the opportunity to attend consultations with the staff of UNECON according to the timetable set out in the schedule of consultations.

The students' in- and out-of-classroom work should aim to form:

* the fundamentals of the learner's world view and scientific understanding;
* basic knowledge relevant to the training area and the declared professional field, forming the target and professional basis for training;
* professional competences oriented towards the needs of the labour market;
* an individual trajectory by mastering a unique set of professional competences that complement the learner's competence model, through a focus on specific professional specialised areas of knowledge defined by labour market representatives;
* metha-skills for learners, such as teamwork and leadership, data analysis, digital skills, project design and implementation, intercultural interaction.

# **8. SPECIFICATIONS FOR TEACHING DISABLED PERSONS**

Students with disabilities, if necessary, are taught on the basis of an adapted work programme using special teaching methods and didactic materials that take into account the particularities of their psychophysical development, individual capacities and health status.

In order for disabled persons and persons with disabilities to master the curriculum, the University shall ensure that:

* for the visually impaired and visually impaired: availability of information on the timetable in accessible places and adapted forms for learners who are blind or visually impaired; presence of an assistant to assist the learner as needed; production of alternative formats of teaching materials (large print or audio files);
* for the hearing-impaired and hearing-impaired: adequate sound reproduction of information;
* for persons with disabilities and persons with mobility impairments: the possibility of unimpeded access for students to classrooms, restrooms and other areas of the department, as well as their stay in these areas.

Learners with disabilities and persons with disabilities are provided with printed and/or electronic educational resources in forms adapted to their disabilities. The education of students with disabilities may be organised with other students or in separate groups or organisations.

# **ASSESSMENT RESOURSES**

# **1.1 Control tasks and assignments for interim attestation**

Is not provided by the work programme of the discipline.

## **1.2 Topics of written works**

|  |
| --- |
| Is not provided by the work programme of the discipline. |

## **1.3 Control points**

|  |  |  |  |
| --- | --- | --- | --- |
| **Checkpoint number Checkpoint** | **type** | **Method of conducting** | **Topic numbers** |
| 1 | Solving problems | orally | 1-2 |
| 2 | Case study | using technical tools and information systems | 3-4 |
| 3 | Monitoring | using technical tools and information systems | 3-4 |

## **1.4 Other evaluation objects**

Is not provided by the work programme of the discipline.

## **1.5 Independent work of the student**

|  |  |
| --- | --- |
| **Names of independent work** | **Topic numbers** |
| Preparation of messages, reports | 1-2 |
| Execution of calculation, analytical, calculation-graphic, etc. tasks | 2-4 |

## **1.6 Grading scale**

Scales of assessment and procedures for assessing learning outcomes of the discipline are regulated by the Regulations on the current control of progress and interim attestation of students in higher education programmes and the Regulations on the scoring and rating system.

**A grading and rating system** is used to assess the learning outcomes of the discipline:

The final control of the discipline is an examination (or a differentiated test), the final grade being formed in accordance with the scale given in the table below:

|  |  |
| --- | --- |
| Points | Grade |
| <55 | Failed |
| >=55 | Passed |

**Grading scale**

|  |  |
| --- | --- |
| 2 (points to 54) | Demonstrates a lack of understanding of the problem. Many of the requirements of the assignment are not met.  An initial perception of the material is demonstrated. The work is incomplete and/or plagiarised. |
| 3 (points 55-69) | Demonstrates a partial understanding of the problem. Most of the requirements of the task have been met.  Mastery of the elements of the assigned material. The material is mostly clear and coherent. |
| 4 (points 70-84) | Demonstrates considerable understanding of the issue by the discipline. All requirements of the assignment are fulfilled.  The content of the completed tasks is disclosed and examined from different perspectives. |
| 5 (points 85-100) | Demonstrates full understanding of the problem. All requirements of the assignment are fulfilled.  Demonstrates proficiency in the discipline. The completed assignments are holistic, complete, structured, present different points of view and demonstrate creativity. |