

## **INVESTMENT COMPANIES AND FUNDS**

**Financial Economics Faculty**

**Year of study: 4<sup>th</sup>**

**Credits: 4 ECTS**

**Practical classes: 144**

**Optional**

**Lecturers: Senior Instructor A. Zamkovej**

**Purpose:** To study the conceptual and methodological principles, organizational and legal mechanism of operation of investment companies and funds as financial market participants.

**Objective:** To determine the functions and role of non-bank financial institutions in the financial services market; specific character and practice of insurance companies and savings and loan associations; types, forms and methods of managing financial assets by asset management companies and pension funds.

**Subject:** organizational and legal relations arising while providing asset management services in the financial services market.

**Content of the subject is revealed in the topics:** Investment companies. Types of investment companies. Fundamentals of operation of investment funds. Domestic collective investment institutions. Insurance companies. Insurance companies in Ukraine. Savings banks and savings and loan associations. Credit unions. Investment banking firms. Pension Funds. Trusts. Collective investment institutions.

**Supporting lectures and practical classes:** computer, multimedia equipment, didactic materials.

**Assessment:** written test, performance of individual tasks, test, lecture and practical modules, test.

**Teaching methods:** interactive (thought-provoking) lectures, role plays, case-studies, business simulations.

**Instructional Support:** reference compendium of lectures, teaching materials, control tests.

**Examination method:** written test.

**Registration for the course:** none.

**Registration for the exam:** as scheduled.

**Language:** Ukrainian or Russian.