

(Table 5.2.) Course unit description

Study program: Economics and business management			
Type and level of studies: Master studies			
Course unit: Financial institutions investment activity			
Teachers in charge: Vladimir Stančić, PhD, Associate Professor, Stevan Luković, PhD, Assistant Professor			
Language of instruction: English			
ECTS: 8			
Prerequisites: None			
Semester: 2 nd (second – summer semester)			
Course unit objective: Acquisition of theoretical knowledge and practical skills in the field of portfolio selection and investment activities of financial institutions. Getting to know the mechanisms and regulatory framework for the creation of funds for investment, the risks that are inherent in investment activity, as well as portfolio investment strategies. Analysis of relevant aspects of investing financial resources in various investment alternatives, including appropriate legal solutions and regulatory restrictions. The acquired knowledge is the basis for the economic and financial evaluation of potential investment alternatives in an attempt to determine the optimal investment portfolio on the international and domestic financial markets.			
Learning outcomes of course unit: Ability to understand the specificity and importance of the investment activity of financial institutions, depending on their basic activity. Acquiring basic knowledge about the legal regulation of potential investment alternatives, which will lead to the ability to perform portfolio analysis on specific examples and choose the most appropriate portfolio strategy.			
Course unit contents <i>Theoretical teaching</i> Market principles applied to financial institutions, sources of investing funds and their structuring, legal and professional regulation for funds creation and investment, identification of risks that accompany the financial institutions investment activity, risk management strategies, portfolio management strategies, investment alternatives analysis, portfolio selection. <i>Practical teaching</i> Exercises: Study research, Discussions, Other forms of lectures			
Literature 1. Sharpe, W. F., Alexander, G. J., Bailey J. V. (1999): Investments, Prentice Hall, Inc., New Jersey 2. Rejda G. E., McNamara M. J. (2014): Principles of Risk Management and Insurance, Pearson Education, Inc., New Jersey 3. Sinha, R. (2018): Pension Finance and Management, ON: e CampusOntario 4. OECD (2021): Annual Survey of Investment Regulation of Pension Funds and Other Pension Providers - 2021, OECD Publishing			
Number of active teaching hours			Other classes
Lectures: 2	Practice: 2	Other forms of lecture	
Teaching methods Lecture, interactive forms of teaching, solving practical problems and presentations			
Examination methods (maximum 100 points)			
Prerequisites	Number of points	Final exam	Number of points
Student's activity during lectures	5	written or oral exam	50
Practical classes/tests	/		
Seminars/homework	5		
Colloquiums	40		