European Journal of Business Startups and Open Society

Vol. 4 No. 05 (May - 2025): EJBSOS

http://inovatus.es/index.php/ejbsos

Optimization of Investment Management Strategy in the Organization

Igamberdieva Aziza Sarvar kizi
Master's Degree Student of the Faculty of International joint educational programs of Tashkent State University of Economics

Annotation. The article examines ways to optimize investment management strategies in enterprises and organizations. The integral relationship of making business decisions on investment management is determined. Strategies have been developed aimed at achieving effective optimization of investment management at enterprises. Scientific proposals and practical recommendations for improving investment management strategies at enterprises have been formulated.

Keywords: investments, strategy, optimization, investment decisions, financing, planning, entrepreneurship, enterprise, efficiency, diversification, evaluation, monitoring, market analysis.

Introduction.

The relevance of investment management as a factor in the development of entrepreneurship is determined by several key aspects. Firstly, economic growth. Investment plays an important role in economic development. They contribute to the creation of new jobs, increased production and increased competitiveness of enterprises. «As we navigate the challenges of the 21st century, the World Investment Report reminds us that investment is about more than just capital. It is about human potential, environmental stewardship, and the ongoing pursuit of a fairer, more sustainable world» [1]. Secondly, innovation and technology. Effective investment management enables companies to implement new technologies and innovative solutions, which is critical to maintaining a competitive advantage in the market. Thirdly, risk management.

In an unstable economic situation and uncertainty, investment management helps entrepreneurs minimize investment risks and optimize profitability. Fourthly, raising capital. Well-organized investment management can increase confidence among investors and lenders, making it easier to access the necessary financial resources to grow your business. Fifth, strategic planning. Successful investment management requires the development of a long-term strategy, which facilitates more targeted business development and its adaptation to changing market conditions. Sixth, sustainable development. In modern conditions, more and more attention is paid to issues of sustainable development and social responsibility of business. Effective investment management takes these aspects into account when making investment decisions.

Literature review. The problems of entrepreneurship development in connection with the optimization of investment processes attract a lot of attention from specialists and have received quite wide coverage in the scientific works of domestic and foreign economists, in particular, in the works of Bal'din K.V., Makridenko E.L., Shvaika O.I. [2], Gubernators A.M. [3], Kholodkova V.V.

[4], Kelchevskaya N.R., Pelymskaya I.S., Makarov L.M. [5], Kovalevskaya N.Yu [6]. and other specialists.

Among the scientists of Uzbekistan, Malikov T.S., Olimzhonov O.O. [7], Vakhabov A.V., Razikova G.Kh., Khadzhibakiyev Sh.Kh. [8], Mamatov B.S., Nosirov E.I. [9], Shaislamova N.K.[10], Nadyrkhanov U.S.[11], Zoyirov L.S., Khanova N.F. [12] and others in their scientific works studied and analyzed the problems of financial support for investment activities, investment management in the national economy, financial mechanisms for attracting foreign investment, increasing the efficiency of investments, they developed scientifically based conclusions, proposals and recommendations.

At the same time, many aspects of entrepreneurship management and investment sphere development remained beyond the scope of the completed studies. In addition, the unstable, constantly changing situation in the field of socio-economic development of the entire country and individual regions requires new approaches to solving the problem of activating investment activities for the purpose of dynamic development of entrepreneurship.

Analysis and results. The success, effectiveness, and long-term viability of any enterprise depend on many conscious decisions made by managers, and every decision has economic consequences. The process of running any business is a series of economic decisions. The basic decision is to invest in new equipment, borrow a lot of money, and produce new products. Most other decisions are part of the daily management process across all business units. According to the basic principle of "economic trade-off", managers must weigh the benefits and costs before making every decision. «In the case of using resources to achieve expected economic benefits for business owners, all business decisions can be attributed to the following main areas» [13]: investments – investments in assets and resources; savings (economy) – arising from the use of these resources; raising funds to form the best structure.

The ongoing transformation process in the national economy requires economic entities to be able to adapt to changes in the external and internal environment. Therefore, the process of developing, implementing and carrying out organizational development strategies is very important.

Formulating an organization's development strategies sets goals and priorities, determines ways to achieve these goals, adjusts goals and priorities when the market may change, and improves the efficiency of the rational use of resources. In connection with the growing role of the investment process in economic literature, the nature and character of the organization's activities, the investment strategy has been carefully thought out. A characteristic feature of the modern national economy is the expansion of independence of economic entities. This requires that the direction of investment activities be focused on improving the long-term performance of the organization.

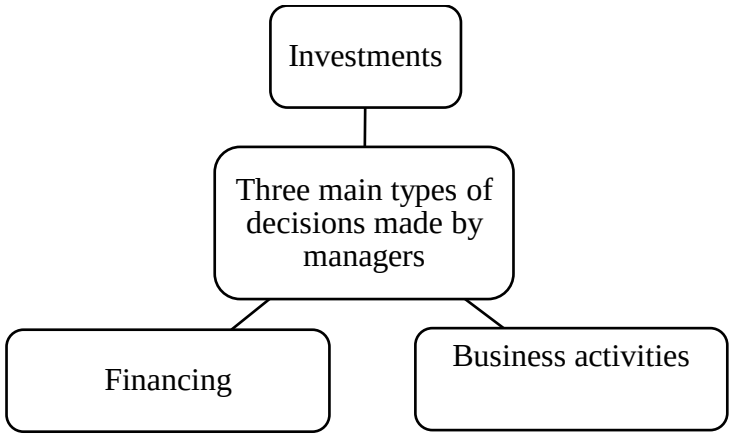


Figure 1. Interdependence of key areas of business decision making [14]

Optimizing an organization's investment management strategy is a key aspect that can significantly impact the financial results and sustainability of the business. Here are some steps and recommendations for achieving effective optimization:

1. Analysis of the current state: assessment of the investment portfolio; analysis of current assets, their profitability and risks; identification of ineffective investments that do not bring the expected profit.

2. Define goals: Set clear and measurable financial goals (e.g. increase revenue by 15% per year); take into account the organization's long-term goals, such as expanding into new markets or implementing innovative technologies.

3. Portfolio diversification: invest in different assets (stocks, bonds, real estate) to reduce risks; explore new sectors and investment opportunities.

4. Use analytical tools: apply models to forecast the returns on various investments; evaluate how changes in market conditions may affect strategy.

5. Monitoring and Evaluation: Conduct regular assessments of asset performance and adjust strategy as necessary; establish KPIs to measure the success of the investment strategy.

6. Team training and development: Invest in training the team in investment management and financial analysis; encourage employees to come up with new ideas to improve the investment strategy.

7. Implement technology: Use investment management software that allows you to track data in real time; apply data analytics tools to identify trends and opportunities in the market.

Optimizing an organization's investment management strategy requires a comprehensive approach that includes analyzing current assets, identifying growth opportunities, and reducing risks. Here are some key steps and recommendations for optimizing an investment strategy:

– analysis of the current portfolio: asset valuation; diversification;

– setting goals: short-term and long-term goals; risk level;

– market research: trend analysis; competitive analysis;

– efficient resource allocation: cost optimization; resource planning;

– use of technologies: automation of processes, implementation of modern IT solutions for automation of data analysis and investment monitoring; analytical tools;

– monitoring and adjusting strategy: regular portfolio review; adaptation to changes.

Thus, improving the investment management strategy requires a comprehensive approach, including analysis of the current state, personnel training, use of modern technologies and regular

monitoring of results. This will help the organization not only optimize its financial resources, but also adapt to changes in the market and increase its competitiveness.

Conclusion. Investment management is a complex process that requires a deep understanding of financial markets, instruments, and risks. Optimizing an investment management strategy allows investors to maximize returns at an acceptable level of risk.

1. Define your goals and constraints. The first step in optimizing your investment strategy is to clearly define your financial goals and constraints. A clear understanding of these aspects will help you formulate a strategy that is aimed at achieving specific goals.

2. Portfolio diversification. One of the key principles of risk management is portfolio diversification. It allows you to reduce the risks associated with individual assets by distributing investments between different asset classes (stocks, bonds, real estate, etc.).

3. Use of quantitative methods. Modern technologies allow the use of quantitative methods to optimize portfolios. This includes the use of mathematical models and algorithms to analyze historical data and predict future trends.

4. Regular review of the strategy. The investment strategy should not be static; it requires regular review depending on changes in the market, the investor's personal circumstances or changes in the market situation.

References:

1. United Nations Conference on Trade and Development. World Investment Report 2024 – Investment Promotion and Digital Government.
2. Bal'din K.V., Makridenko E.L., Shvaika O.I. Investment management. Textbook for bachelors. – M.: «Dashkov i K», 2023. – 238 p.
3. Gubernatorov A.M. Investment project management: textbook. – M.: “Dashkov i K0”, 2023. – 361 p.
4. Kholodkova V.V. Investment project management: textbook and practical training for universities. - M .: "Yurait", 2024. - 302 p.
5. Kelchevskaya N.R., Pelymskaya I.S., Makarov L.M. Investment design: a tutorial / Ministry of Science and Higher Education of the Russian Federation, Ural Federal University. - Ekaterinburg: "Ural. University", 2020. - 140 p.
6. Kovalevskaya N.Yu. Investment Project Management. Study Guide. – Irkutsk: “BSU”, 2017. – 112 p.
7. Malikov T.S., Olimjonov O.O. Finance. Textbook. – T.: “Iktisod-moliya”, 2019. – 920 p.
8. Vakhabov A.V., Razikova G.Kh., Khadzhibakiyev Sh.Kh. Foreign investments and modernization of the national economy. – T.: “Moliya”, 2011. – 300 p.
9. Mamatov B.S., Nosirov E.I. Investment Project Management. Textbook. - T.: «Iktisod-moliya». 2023. – 300 p.
10. Shaislamova N.K. Investment and innovations. Manual. – T.: 2022. – p.432.
11. Nadyrkhanov U.S. Foreign direct investment in Uzbekistan: experience, problems, growth prospects. Monograph. – T.: Fan va tekhnologiyalar, 2011. – 184 p.
12. Zairov L., Khanova N. Investments. Textbook. – T.: IQTISOD-MOLIYA, 2019. – 480 p.
13. Valezhnikova M. V. Methods for assessing investment attractiveness. - M.: 2018. – P. 49.
14. strategicheskoe-upravlenie-investitsiyami-na-predpriyatii.pdf