

Veer Narmad South Gujarat University
Bachelor of Business Administration
Year – III (Semester – VI) (W.E.F. A.Y.2021-22)

Subject Name: Investment and Portfolio Management
(Finance Elective Group)
Subject Code: FSE-3 603

objectives

- To develop a concrete understanding of the theory and practice of investment management.
- To get the students familiar with the different investment avenues and management of investments.
- To develop the skills for the portfolio constructions, evaluation and investment advisory

Teaching Pedagogy:

- Students are involved through lectures, discussions, numerical, stock exchange visit (if possible)

Course Content

- Introduction to Investment** **(15%)**
Basic Concept, objectives and characteristics of investment, Investment vs. speculation and Gambling, Investment decision making Process, Different investment alternatives and their risk & return profile
- Operations of Indian Stock Market** **(20%)**
Basics of Stock Market, New issue market: IPO, Book building procedure, listing of securities, Secondary market: Types of brokers, types of orders, mechanics of investing, Basic objectives and functions: SEBI, NSE, BSE, NSDL
- Security Analysis** **(20%)**
Methods of security analysis: Basic theory of Technical Analysis (RSI, MACD), Fundamental Analysis (Economic, Industry and Company)
- Introduction to Portfolio Management** **(25%)**
Meaning of portfolio and portfolio management, Concept of Diversification and Portfolio management process, Portfolio Analysis and evaluation: Markowitz Model, Sharpe Single Index Model, Capital Assets Pricing Model (Theory & Examples)

□ **Mutual Fund – An Investment Avenue**

(20%)

Concept, types and benefits of mutual funds, NAV, Entry and Exit load, risk in mutual funds, Flow chart of mutual fund, AMCs, Basics of Exchange Traded Funds (ETFs) and overview on Systematic Investment Plan(SIP)

Suggested Reading:

- P. Pandian, Security Analysis & Portfolio Management Vikas Publishing Latest Edition
- Kevin S. (2011), Security Analysis and Portfolio Management, PHI Learning Private Limited.
- Fischer Donald E. and Jordan Ronald J., Security Analysis and Portfolio Management, PHI, New Delhi, 6th edition, 1995.
- Amling Frederic, Investment, Prentice Hall Inc, Englewood Cliffs, New Jersey, 1983.
- Fuller Russell J. and Farrell James L., Modern Investment and Security Analysis, McGraw Hill, New York, 1993.
- Bhalla V.K., Investment Management: Security Analysis and Portfolio Management, S. CHAND, New Delhi, Latest Edition