

**SES's L.S. RAHEJA COLLEGE OF ARTS AND COMMERCE
(AUTONOMOUS)**



Syllabus of Investment Management under NEP 2020 vertical (Major) with effect from 2024-25

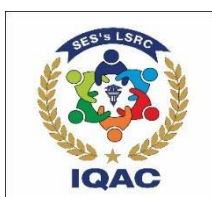
BOS – Accountancy and Finance

HoD / Coordinator of the Department: CA. Hrishikesh Wandrekar

Date of approval by the BoS in Accountancy on: 27th April, 2024

Approved by the Academic Council on: 29th April, 2024

Ratified by the Governing Body on: 6th May, 2024



Programme: Bachelor of Commerce (Management Studies)		Semester: II			
Course: Investment Management Academic Year: 2024-2025 Batch: 2024-2027		Code: UGBMSIIMJ224			
Teaching Scheme	Evaluation Scheme				
Lectures	Practical	Tutorials	Credits	Internal Continuous Assessment (ICA) (weightage)	Term End Examinations (TEE) (weightage)
45	Nil	Nil	3	30 marks/40% of the total marks	45 marks/60% of the total marks

Learning Objectives:	<ol style="list-style-type: none"> 1. The objective of the course is to familiarize the students with the principles and practice of Investment Management. 2. The course will also acquaint the students with the functioning of the Indian securities market. 3. To enable them to understand the concept of Risk, return and Portfolio management strategies
Learning Outcomes:	<ol style="list-style-type: none"> 1. Course provides basic knowledge about investment and financial assets. 2. Learners will be aware of the securities market and its operations. 3. Learners will be able to understand the types of risk and various portfolio management strategies.
Pedagogy:	Classroom teaching, case-studies, group discussions, problem solving

Module	Module Content	Module Wise Duration
I	Investment: Meaning, characteristics of Investment management, Economic vs. Financial Investment, Factors of sound investment, Investment Process. Financial Assets: Meaning – Classification – Shares – Debentures – Bonds – Innovative Financial Assets- Properties of Financial Assets	15
II	Securities Market: Primary Market – Factors to be considered to enter the primary market, Modes of raising funds, Parties involved, Allotment process. Secondary Market - Major Players in the secondary market, listing and delisting of securities, Functioning of Stock Exchanges, Trading and Settlement Procedures, Leading Stock Exchanges in India.	15

III	Risk and Return Concepts: Concept of Risk, Sources of Risk, Types of Risk - Systematic risk, Unsystematic risk, Calculation of Risk and returns. Portfolio Management Strategies: Meaning –Traditional Vs Modern Portfolio Analysis, Return on Portfolio, Risk on Portfolio, Diversification of Investments. Portfolio Revision: Portfolio Revision Strategies – Objectives, Performance plans.	15
-----	--	----

REFERENCE BOOKS

1. V. (2008, June 1). Investment Management (Security Analysis and Portfolio Management), 19th Ed. S. Chand Publishing
2. Prasanna, C. (2012, January 1). Investment Analysis and Portfolio Management
3. Singh, P. (2000, January 1). Investment Management: Security Analysis and Portfolio Management.
4. Machiraju, H. (2010, January 1). Indian Financial System, 4th Edition. Vikas Publishing House
5. C, V. K. (2005, January 10). Credit Risk Management: Concepts And Cases
6. Khan, M. Y. (2013, January 1). Indian Financial System. Tata McGraw-Hill Education
7. Institute, C. (2020, November 24). Portfolio Management in Practice, Volume 1. John Wiley & Sons
8. Markowitz, H. M., & Blay, K. (2013, September 6). Risk-Return Analysis: The Theory and Practice of Rational Investing (Volume One). McGraw Hill Professiona
9. Singh, J. (1994, January 1). Working of Security Market in India
10. Demaria, C., Pedernana, M., He, R., Rissi, R., & Debrand, S. (2021, April 19). Asset Allocation and Private Markets. John Wiley & Sons
11. Honohan, P. (2006, January 1). Household Financial Assets in the Process of Development
12. Wagner, W. H., & Rieves, R. A. (2009, July 15). Investment Management. John Wiley & Sons

Note: Latest edition of textbooks may be used.

QUESTION PAPER PATTERN

Internal Continuous Assessment (ICA) Pattern

Particulars	Marks
Class Test	10
Assignment/Project	10
Presentation/Viva Voce	10
Total	30

Term End Examinations (TEE)

Maximum Marks: 45

Duration: 1.50 Hours

All questions are compulsory.

Question No.	Description	Total Marks
1	C. Full length Practical/Theory Questions OR	15
	D. Full length Practical/Theory Questions	
2	C. Full length Practical/Theory Questions OR	15
	D. Full length Practical/Theory Questions	
3	C. Full length Practical/Theory Questions OR	15
	D. Full length Practical/Theory Questions	

Note: The Practical/Theory Questions of 15 marks each can be split up into two smaller problems carrying 8 marks and 7 marks respectively.