

## **Bachelor of Management Studies**

### **Syllabus for - Security Analysis and Portfolio Management**

<b>Old Syllabus</b>	<b>Proposed Syllabus</b>
Title of the Paper: <b>Security Analysis and Portfolio Management</b>	Title of the Paper: <b>Security Analysis and Portfolio Management</b>
Subject Code: 6001	Subject Code:

<b>PAPER TITLE</b>	<b>L</b>	<b>Cr</b>	<b>P/T</b>	<b>D (EE)</b>	<b>EE</b>	<b>IE</b>	<b>T</b>
	04	04	Tutorials	2:30 hrs	75 Marks	25 Marks	100 Marks

#L=Lectures per week,

Cr=Credits, P/T=Practical/Tutorials, D=External Exam Duration, EE=External Examination, IE=Internal Examination, T=Total Marks

Old Syllabus	Proposed Syllabus
<p><b>Objectives:</b></p> <p>The student will be able to design a portfolio and can take investment decisions.</p> <p><b>Outcomes:</b></p>	<p><b>Objectives:</b></p> <ul style="list-style-type: none"> <li>• This course provides a broad overview of investment management, focusing on the application of finance theories by the portfolio managers.</li> <li>• To provide conceptual foundation for the purpose of undertaking Investment analysis for securities as well as portfolios.</li> </ul> <p><b>Learning Outcomes:</b></p> <p>At the end of this course students should be able to:</p> <ul style="list-style-type: none"> <li>• Developing a theoretical and practical background in the field of investments.</li> <li>• Students would be acquainted with Fundamental and Technical analysis tools like Charts, Patterns and other mathematical and market indicators.</li> <li>• Designing and managing equity portfolios</li> <li>• Measuring the portfolio performances.</li> </ul>

		Proposed Syllabus							
Unit 1	Topic and Details Old Syllabus	Module	Module Specific Objectives	Content	Weightage	Instruction Time	Credits	Evaluation	
								IE Weightage	EE Weightage
I	<b>Introduction to Portfolio Management and Investment</b> <ol style="list-style-type: none"> <li>Meaning</li> <li>Phases of Portfolio Management</li> <li>Role of Portfolio Management.</li> </ol> Financial and Economic Meaning of Investment	I	<ul style="list-style-type: none"> <li>To introduce the concept of Portfolio management and make students acquainted with the process.</li> </ul>	<b>Introduction to Portfolio Management and Investment</b> <ol style="list-style-type: none"> <li>Meaning</li> <li>Phases of Portfolio Management</li> <li>Role of Portfolio Management.</li> <li>Financial and Economic Meaning of Investment</li> </ol>	25	15 hours	1	5	15
II	<b>Investment and Risk analysis</b> <ol style="list-style-type: none"> <li>Characteristics and objectives of               <ol style="list-style-type: none"> <li>Investment V/S Speculation.</li> <li>Investment V/S Gambling</li> </ol> </li> <li>Types of investors and investment Avenues.</li> </ol> <b>Risk</b> <ol style="list-style-type: none"> <li>Meaning , Elements: ((Systematic Risk , Unsystematic Risk) (Excluding Measurement of Risks)</li> </ol>	II	<ul style="list-style-type: none"> <li>To understand the various Types of investors.</li> <li>To understand the various type of the investment options available to the investors.</li> <li>Types of risks in a portfolio</li> </ul>	<b>Investment and Risk analysis</b> <ol style="list-style-type: none"> <li>Characteristics and objectives of               <ol style="list-style-type: none"> <li>Investment V/S Speculation.</li> <li>Investment V/S Gambling</li> </ol> </li> <li>Types of investors and investment Avenues.</li> </ol> <b>Risk</b> <ol style="list-style-type: none"> <li>Meaning, 2 Aspects of Risk (Safety and Security)</li> <li>Elements: ((Systematic Risk ,</li> </ol>	25	15 hours	1	7	20

					Unsystematic Risk) (Excluding Measurement of Risks)					
III	<b>Fundamental and Technical Analysis</b> a) Meaning of Fundamental Analysis b) Introduction to Economy, Industry and company Analysis framework.  c) Technical Analysis  i) Meaning ii) Principles of Technical Analysis iii) Elliot Wave Theory		III	<ul style="list-style-type: none"><li>To evaluate the management of the property and make internal financial decisions</li><li>To help determine future prices and market developments</li></ul>	<b>Fundamental and Technical Analysis</b> a. Meaning of Fundamental Analysis b. Introduction to Economy, Industry and company Analysis framework.  c. Technical Analysis  i. Meaning ii. <b>Types of Charts used in technical analysis</b> iii. Principles of Technical Analysis iv. Elliot Wave Theory	25	15 hours	1	7	20
IV	<b>Efficient Market Theory &amp; Portfolio Selection Model</b> Weak form, semi strong form, strong form of efficient markets. Markowitz Model, CAPM Model		IV	<ul style="list-style-type: none"><li>To make students aware of the various theories in Portfolio Management.</li></ul>	<b>Efficient Market Theory &amp; Portfolio Selection Model</b> a. Weak form, semi strong form, strong form of efficient markets. b. Markowitz Model c. CAPM Model	25	15 hours	1	6	20

## Evaluation Scheme:

### A. Internal Exams: Total Marks: 25

The internal testing should be continual and spread over the semester:

- Written Test
- MCQ
- Assignments
- Quiz
- Case Study

### B. External Exams: Total Marks: 75

The pattern of the written exam would be as follows:

Q.1 is compulsory attempt any 6 out of the remaining.

Q.1 Concepts and Definitions

15 Marks

Q.2 Short Notes

10 Marks

Q.3 to Q.8 Long Questions

10 Marks

### Reference Books:

1. SK Singla , Manisha Gupta, Ruchika Jain-Security Analysis and Portfolio Management B.Com-II Semester-IV Punjab University (2020-21)
2. Prasanna Chandra -Investment Analysis and Portfolio Management- March 2017- Pearson Publisher
3. Frank K. Reilly, Keith C. Brown -Analysis of Investments and Management of Portfolios (2012), Publisher: South-Western Cengage Learning.
4. M. Ranganatham -Investment Analysis and Portfolio Management (2006) Publisher: Pearson Education/Dorling Kindersley (India)

### Additional References:

1. N. G. Kale & Dr. P. K. Bandgar -Investment Analysis & Portfolio Management (June 2003) Publisher: Vipul Prakashan
2. Dr. Preeti Singh -Investment Management, Security Analysis & Portfolio Management (2003) published by Meena Pandey for Himalaya Publishing House.
3. Dr. G. Ramesh Prabhu-Portfolio Management (including Security analysis) – (2007) published by Ashok K. Mittal for concept Publishing Co.