

Course Type	Course Code	Name of the Course	L	T	P	Credits
DE	NMSD505	Investment Analysis and Portfolio Management	3	0	0	3

#### Course Objective

The objectives of this course are:

- This course provides a broad overview of investment management, focusing on the application of finance theory to the issues faced by portfolio managers and investors in general.
- It develops general portfolio management tools which are applicable when managing portfolios with any or all asset classes.

#### Learning Outcomes

- To understand the concept of Investment Planning and Investment Analysis.
- To develop understanding about the functioning of the Financial Markets and fundamental factors influencing the financial markets.
- To design strategies for portfolio construction, optimization and evaluation.

Unit No.	Topics to be Covered	Lecture Hours	Learning Outcome
1	<ol style="list-style-type: none"> <li>Investment Scenario</li> <li>Investment Planning</li> <li>Investment Analysis</li> </ol>	6	To understand the concept and theoretical framework of Investment Planning and Analysis. It will also discuss the various modes of investment for individual, corporate and government.
2	<ol style="list-style-type: none"> <li>Money Market</li> <li>Capital Market</li> <li>Economic Analysis</li> <li>Industry Analysis</li> <li>Company Analysis</li> <li>Technical Analysis</li> <li>Case Studies in Financial Markets and Fundamental Analysis</li> </ol>	20	To develop an insight into the different financial markets globally and in India and help in understanding the various factors influencing the valuation of stocks.
3	<ol style="list-style-type: none"> <li>Risk and Return of Individual Assets</li> <li>Risk and Return of Portfolio</li> <li>Portfolio Selection Models</li> <li>Sharpe's Single Index Model</li> <li>Capital Asset Pricing Model</li> <li>Measuring Portfolio Performance</li> <li>Efficient Market Hypothesis</li> <li>Case studies in Portfolio Management</li> </ol>	16	To develop an understanding of the concept of portfolio construction, optimization and evaluation.
	Total	42	

#### Textbooks:

- Security Analysis and Portfolio Management – Punithavathy Pandian, Vikas Publishing
- Investments: Analysis and Management – Charles P Jones, Wiley Publication

## **References:**

1. Investments – Kane, Marcus and Mohanty, McGraw Hill
2. Financial Markets and Institutions – Saunders and Cornett , McGraw Hill
3. Indian Financial System – H R Machiraju, Vikas Publishing
4. Investment Analysis and Portfolio Management – P Chandra, McGraw Hill