Course Code	MB18FM01	Course Name	Investment Analysis and Portfolio Management	Course Category	Elective Course	L	T	P	C
						3	0	2	4

Pre-requisite Courses	Corporate finance	Co-requisite Courses	Indian financial system	Progressive Courses	
Course Offering Department	Faculty of Management	Data Book / Codes / Standards		Present value, Future value tables and Normal distribution	

Course Learning Rationale (CLR):	The purpose of learning this course is to:	Learning	Program Learning Outcomes (PLO)

		1	2	3
		Level of Thinking (Bloom)	*Expected Proficiency (%)*	*Expected Attainment (%)*
CLR-1 :	Develop a basic understanding of the investments field and investment environment			
CLR-2 :	Comprehend the functionalities of the securities market and its components			
CLR-3 :	Practice the tools and techniques of individual securities and portfolio analysis			
CLR-4 :	Analyze, value and forecast the securities performance using various models			
CLR-5 :	Exhibit the capacity to construct portfolios and arrive at optimal portfolios			

On completion of this course the students should be in a position to exhibit the following learning skills:

Course Learning Outcomes (CLO):	*At the end of this course, learners will be able to:*	1	2	3	1	2	3	4	5	6	7	8	9	10	11	12
		Level of Thinking (Bloom)	*Expected Proficiency (%)*	*Expected Attainment (%)*	Effective communication skills	Initiate critical thinking	Resources analysis for organisations	Familiarize organisations and its stakeholders	Integrate functional knowledge with strategic skills	Comprehend effectively in globalized environment	Practice business ethics with integrity	Enhance careers and commitment	Instigate entrepreneurial drive	Application of multidisciplinary knowledge comprising of finance, operations, system, marketing and human resources management to integrate business projects PSO - 1	Usage of business metrics to evaluate business projects to develop growth strategies PSO - 2	Authorize the students to innovate and execute the business idea during the challenging business situation PSO – 3
CLO-1 :	Demonstrate a basic understanding of investments and the nuances of investing	1	60	60	*M*	*H*	*H*	*M*	*L*	*M*	*M*	*M*	*L*	*H*	*H*	*H*
CLO-2 :	Exhibit the acquaintance of the securities market and its constituents	1	70	70	*L*	*H*	*L*	*L*	*M*	*M*	*M*	*L*	*L*	*M*	*H*	*H*
CLO-3 :	Apply knowledge gained to perform analysis of various securities	2	80	70	*M*	*H*	*L*	*L*	*M*	*M*	*L*	*L*	*L*	*M*	*H*	*M*
CLO-4 :	Analyze and apply models to securities performance and forecasting	2	80	70	*M*	*H*	*M*	*L*	*M*	*M*	*L*	*L*	*L*	*M*	*H*	*H*
CLO-5 :	Construct optimal portfolios and evaluate them using models	3	90	80	*M*	*H*	*H*	*L*	*M*	*M*	*L*	*L*	*H*	*H*	*H*	*L*

Duration (hour)		6	6	6	6	6
S-1	SLO-1	Introduction to Investment	Securities Market - meaning	Fundamental analysis - meaning	Valuation of Securities - meaning	Portfolio Management - meaning
	SLO-2	Investment – Meaning and Definition	Capital market – Primary market and Secondary market	Economic analysis – meaning and macro economic variables	Valuation of Equity - meaning	Steps in Portfolio Construction
S-2	SLO-1	Investment Objectives	Process of IPO	Economic forecasting and Stock Investment Decisions	Dividend Discount Model	Diversification
	SLO-2	Investment Process	FPO			Types of Diversification

S-3	SLO-1	Avenues of Investment	Listing of Securities	Industry analysis – meaning	Zero Growth Model	Portfolio Risk and Return analysis – simple problems
	SLO-2			Industry classification		
S-4	SLO-1	Investment and Speculation	Secondary market trading and operations	Industry life cycle	Constant Growth Model	Markowitz Portfolio Selection Model
	SLO-2	Investment information		Evaluating Industry Relevant factors		
S-5	SLO-1	Risk and Return	Regulating bodies – SEBI	Company Analysis – meaning	Valuation of Preference shares	Portfolio Evaluation – meaning
	SLO-2	Risk - Meaning	Stock exchanges	Forecasting earnings	Simple problems	Jenson Index
S-6	SLO-1	Types of Risk	Stock exchanges in India	Technical Analysis – meaning	Valuation of Bonds	Sharpe Index
	SLO-2		BSE and NSE	Different tools and techniques	YTM	Treynor's Index
S-7	SLO-1	Risk Return Trade off	SEBI Act	Rate of Change (ROC)	YTC	Portfolio Revision
	SLO-2	Risk Exposure	Securities Contract Regulation Act	Moving Average Convergence Divergence (MACD)	Arbitrage Pricing Theory (APT)	
S-8	SLO-1	Expected Return	Index Calculation – types of indices	Oscillators	Capital Asset Pricing Model (CAPM)	Optimal Portfolio
	SLO-2	Calculation of Expected return – simple problems	Methods of calculating indices	Trends – Relative Strength Index		
S-9	SLO-1	Risk and Return analysis of individual securities - Standard Deviation	Global Index	Overview of other indicators	Efficient Market Hypothesis (EMH)	Simple problems
	SLO-2		Global exchanges			
S-10	SLO-1	Case study I	Case Study II	Case study III	Case study IV	Case study V
	SLO-2					
S 11-12	SLO-1	Summary and Revision with extra problems	Practical session on Functioning of stock exchanges using Yahoo Finance, Google Finance	Practical session on Technical analysis tools	Summary and revision with extra problems	Summary and revision with extra problems
	SLO-2					

Learning Resources	1. Security Analysis and Portfolio Management, VA Avadhani Pearson Publications. 2. Fundamentals of Investment Management, Hirt and Block, Tata McGraw Hill. Ed 2009. 3. Portfolio Management Handbook, Robert A. Strong, Jaico Publishing House, Mumbai. 4. Security Analysis and Portfolio Management, Prasanna Chandra, Tata McGraw Hill. 5. Practical case studies that is contemporary and relevant to the current context	Equity research reports published by Citi group, Barkley's and HSBC on fundamental analysis.

Learning Assessment

	Bloom's Level of Thinking	Continuous Learning Assessment (50% weightage)								Final Examination (50% weightage)	
		CLA – 1 (10%)		CLA – 2 (15%)		CLA – 3 (15%)		CLA – 4 (10%)			
		Theory	Practice	Theory	Practice	Theory	Practice	Theory	Practice	Theory	Practice
Level 1	Remember	15	15	20	20	15	15	15	15	15	15
	Understand										
Level 2	Apply	20	20	15	15	15	15	20	20	20	20
	Analyze										
Level 3	Evaluate	15	15	15	15	20	20	15	15	15	15
	Create										
	Total	100 %		100 %		100 %		100 %		100 %	

CLA – 4 can be from any combination of these: Assignments, Seminars, Tech Talks, Mini-Projects, Case-Studies, Self-Study, MOOCs, Certifications, Conference Paper, etc.

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