

Course Code	Course Title	C	H	I	E	T
17U6KMC15	Investment Management	5	90	25	75	100
Learning objectives <ul style="list-style-type: none"> To gain knowledge of investments and investment alternatives To develop ability to value the securities by fundamental and technical analysis To understand the concept of portfolio management, theories of Portfolio management and evaluate the portfolio 						
Learning Outcomes: Advanced knowledge on investment management. Skill towards fundamental and technical analysis. Understanding of derivatives market and portfolio management and evaluation						

Unit I

Introduction to Investment Management

Investment: Meaning of Investment – Need of Investment – Scope of Investment – Differences between Investment, Speculation and Gambling – Factors favourable for Investment – Features for an Investment programme - Investment Media - Investment process.

Unit II

Investment Avenues

Introduction – Investor Classification – Corporate Bonds – Features of Bonds – Preference Shares – Features – Types – Equity Shares – Features – Government Securities – Types – Innovative Financial Instruments.

Unit III

Risk and Return

Risk – Meaning – Systematic Risk – Unsystematic Risk. Returns – Meaning – Relationship of Risk and Return – Measurement of Returns – Investors Attitude towards Risk and Return.

Unit IV

Fundamental and Technical Analysis

Fundamental Analysis – Meaning - Features – EIC Approach - Economic Analysis – Industry Analysis – Company Analysis.

Technical Analysis – Meaning – Assumptions – Difference between Fundamental and Technical Analysis – Theories of Technical Analysis – Dow Theory – Elliott Wave Theory – Theory of Contrary opinion – Odd lot Theory – Charting as a Technical Tools – Bar Chart – Line Chart – Point and Figure Chart – Candle Stick Chart – Efficient Market Hypothesis – Meaning – Assumptions.

Unit V

Portfolio Management

Meaning – Objectives – Portfolio Management Process – Need – Importance – Types of Portfolio – Aggressive Investment Portfolio – Balance or Moderate Portfolio – Conservative Portfolio – Mutual Funds – Features of Mutual Fund – Types – SEBI Regulations for Mutual Fund Investments – Management Performance Evaluation

Book for Study:

Preeti Singh, *Investment Management Security Analysis and Portfolio Management*, 19th Revised Edition, 2015, Himalaya Publishing House, New Delhi.

Books for References:

1. V.K.Bhalla, *Investment Management Security Analysis and Portfolio Management*, S.Chand & Company Ltd, New Delhi.
2. Dr.R.P. Rustagi, *Investment Analysis and Portfolio Management*, Sultan Chand & Sons, New Delhi.
3. M/.Ranganatham & R. Madhumathi, *Investment Analysis and Portfolio Management*, Pearson Education, Delhi.
4. www.investopedia.com