

CORE COURSE – XIV - PORTFOLIO MANAGEMENT

UNIT I:

Investment Setting – Overview – Securities market – Taxes.

UNIT II:

Investment Spectrum : - Financial Securities – Equity – Preference Shares – convertible bonds – NCD – Public sector bonds – savings certificates – Govt. Securities – Money market securities – Commercial Paper – Other newer securities.

UNIT III:

Mutual Fund – what and why Guidelines for mutual funds – Debt – oriented Schemes – Equity – Oriented schemes – Balanced schemes – Performance of Mutual funds Real Estates – Residential and other forms of properties – Gold and Silver etc.,

UNIT IV:

Investment Analysis – Financial Statement Analysis – Analysis of fixed income avenues – valuation of Equity shares – Technical Analysis etc.

UNIT V:

Investment Management – Insights from modern Research – Investment Management framework – specification of investment objectives – selection of asset mix – formulation of portfolio strategy – selection of securities – portfolio execution – portfolio rebalancing – performance evaluation.
(Marks Theory 40%, Problems 60%)

TEXT BOOK:

The Investment Game: Prasama chandra Publishers: Tata McGraw-Hill Publishing Company Ltd., New Delhi. 1994.