

Name of the Programme : MBA (Financial Services)
Course Code : MGF-507
Course Title : Investment Management
Number of Credits : 3
Effective from AY : 2022-23

Pre-requisites for the Course:	NIL	
Course Objectives:	To enable learners, acquire skills in analyzing various types of securities and develop competencies for selection and management of investment portfolio with modern approaches.	
Content:	Unit 1 Introduction to Investment Management <i>Investment Management: Nature and Scope, Investment Avenues, Types of Financial Assets and Real Assets, Investment goals and investment policy.</i> <i>Security, Return and Risk: Systematic and Unsystematic Risk, sources of Risk, Measurement of Risk and Return, Sources of Investment Information.</i> <i>Fixed Income Securities: Bonds, Preference Shares, Sources of Risk, Valuation.</i>	12 Hours
	Unit 2 Security Analysis <i>Fundamental Analysis: Economic analysis, Industry analysis and company Analysis, Value investing. Technical Analysis: Dow's Theory, Charts and indicators, Efficient Market Hypothesis and its implications.</i>	10 Hours
	Unit 3 Portfolio Selection <i>Meaning of Portfolio Management: Portfolio Analysis, Objectives, Process, Selection of Securities, Portfolio Theory: Markowitz Model, Sharpe's Single Index Model, Efficient Frontier with Lending and Borrowing, Optimal Portfolio, Capital Asset Pricing Model, Arbitrage Pricing Theory, Factor Models</i>	12 Hours
	Unit 4 Equity Portfolio Management Strategies <i>Portfolio Strategies: Equity Portfolio Management Strategies, Portfolio Revision, Portfolio Rebalancing Plans, Portfolio Evaluation: Sharpe's Index - Treynor's Measure and Jensen's Measure.</i>	11 Hours
Pedagogy:	Lectures/ Lab exercises/Class room Discussions/Assignments/Seminar/ Presentations.	
References/ Readings:	<ol style="list-style-type: none"> 1. Donald E. Fischer and Ronald J. Jordan. (2017). <i>Security Analysis and Portfolio Management</i>. Pearson. 2. Pandian, P. (2013). <i>Security Analysis and Portfolio Management</i>. Vikas Publishing House Pvt. Ltd. Latest Edition. 3. Linton, D. (2020). <i>Foundations of Investment Management: Mastering Financial Markets, Asset Classes, and Investment Strategies</i>. J. Ross Publishing. 4. Chandra, P. (2021). <i>Investment Analysis & Portfolio Management</i>. McGraw Hill Education India Pvt. Ltd. Graham, B. (2013). <i>The Intelligent Investor</i> . Harper Business.	
Course Outcomes:	After completion of this course the students will be able to CO1. Design investment policy and asset mix based on investor goals.	

	<p>C02. Evaluate securities based on fundamental and technical analysis.</p> <p>C03. Construct portfolios using modern approaches of portfolio selection.</p> <p>C04. Evaluate portfolio performance and design portfolio rebalancing strategies.</p>
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