

STELLA MARIS COLLEGE (AUTONOMOUS), CHENNAI
Course Schedule: June - November 2024

Department : COMMERCE
Name/s of the Faculty : MS. JESINTHA PREETHI FRANCENA. V
Course Title : FUNDAMENTALS OF INVESTMENT PLANNING
Course Code : 19CM/GE/FI22
Shift : I

Week & No. of hours	Units & Topics	Teaching Methodology	Text & References	Method of Evaluation
Jun 19 – 26, 2024 (Day Order 1 - 6)	Unit 1 Introduction to Financial Planning 1.1 Financial planning – Meaning and Importance 1.2 Investment- Definition, Nature, Factors Influencing Investment.	Lecture and Presentation	Madhu Sinha, “Financial Planning: Theory and Practice” Ankit Gala and Khushboo, “Investment Planning”	CA Test
Jun 27 – July 4, 2024 (Day Order 1 - 6)	1.2.1 Financial Planning- Meaning and Importance	Lecture and Presentation	Madhu Sinha, “Financial Planning: Theory and Practice” Ankit Gala and Khushboo, “Investment Planning”	CA Test
July 5 – 12, 2024 (Day Order 1 - 6)	1.2.2 The Personal Financial Planning Process, Preparation of Personal Budget	Lecture and Presentation	Madhu Sinha, “Financial Planning: Theory and Practice” Ankit Gala and Khushboo, “Investment Planning”	CA Test Component
July 15 – 23, 2024 (Day Order 1 - 6)	1.3 Personal Financial Statements, tax planning and legal aspects of financial planning	Lecture and Presentation	Madhu Sinha, “Financial Planning: Theory and Practice” Ankit Gala and Khushboo, “Investment Planning”	CA Test Component
July 24 – 31, 2024 (Day Order 1 - 6)	1.4 Investment Media, Principles, Avenues and Modes.	Lecture and Presentation	Madhu Sinha, “Financial Planning: Theory and Practice” Ankit Gala and Khushboo, “Investment Planning”	CA Test Component
Aug 1 – 5, 2024	Unit 2 Investment options and operational scenario. 2.1 Needs and benefits of investing	Lecture and Presentation	Madhu Sinha, “Financial Planning: Theory and Practice”	CA Test Component

(Day Order 1 - 3)			Ankit Gala and Khushboo, “Investment Planning”	ent
Aug 6 – 10, 2024	C.A. Test – I			
Aug 12 – 14, 2024 (Day Order 4-6)	2.2 Sources of financial information	Class Discussion	Madhu Sinha, “Financial Planning: Theory and Practice” Ankit Gala and Khushboo, “Investment Planning”	CA Test Component
Aug 16 – 23, 2024 (Day Order 1-6)	2.3 Personal Savings & Investment: Investment Criteria- Liquidity, Safety and Profitability,	Lecture and Presentation	Madhu Sinha, “Financial Planning: Theory and Practice” Ankit Gala and Khushboo, “Investment Planning”	CA Test Component
Aug 27 – Sep 3, 2024 (Day Order 1-6)	Savings and Instruments of Post Office and Banks. Chit Funds. Investment in Shares, Debentures, Corporate and Government Bonds	Lecture and Presentation	Madhu Sinha, “Financial Planning: Theory and Practice” Ankit Gala and Khushboo, “Investment Planning”	CA Test Component
Sep 4 – 11, 2024 (Day Order 1-6)	2.4 Systematic Investment Planning, National Pension Scheme, Public Provident Fund (Retirement Savings Plans, Pension Plans)	Lecture and Presentation	Madhu Sinha, “Financial Planning: Theory and Practice” Ankit Gala and Khushboo, “Investment Planning”	CA Test Component
Sep 12 - 20, 2024 (Day Order 1- 6)	Unit 3 Insurance and Risk Management 3.1 Analysis of Risk in Investment (Theory)	Lecture and Case Study Analysis	Dr. P.K. Gupta, Insurance and Risk Management	CA Test Component
Sep 23 - 26, 2024 (Day Order 1-4)	3.1 Analysis of Risk in Investment (Theory) Contd.	Lecture and Case Study Analysis	Dr. P.K. Gupta, Insurance and Risk Management	CA Test Component
Sep 27 – Oct 3, 2024	C.A. Test – II			

Oct 4 – 5, 2024 (Day 5 & 6)	3.1 Analysis of Risk in Investment (Theory) Contd.	Lecture and Case Study Analysis	Dr. P.K. Gupta, Insurance and Risk Management	CA Test Component
Oct 7 - 15, 2024 (Day Order 1 to 6)	3.2 Insurance Contract: Life Insurance Contract- Features, Policy	Lecture and Case Study Analysis	Dr. P.K. Gupta, Insurance and Risk Management	CA Test
Oct 16 - 22, 2024 (Day Order 1 to 6)	Conditions and General Insurance Plans and Products	Lecture and Case Study Analysis	Dr. P.K. Gupta, Insurance and Risk Management	CA Test
Oct 23 - 24, 2024 (Day Order 1 to 2)	REVISION			

Component

- Preparation of personal investment portfolio – Individual 15 marks, 20 sept, 2024
- Group presentation on Investment avenues – 10 marks.