STELLA MARIS COLLEGE (AUTONOMOUS), CHENNAI

COURSE PLAN (November 2024 – April 2025)

Department : **Commerce**

Name of the Faculty : **Ms. Jesintha Preethi Francena. V**

Course Title : **Security Analysis and Portfolio Management**

Course Code : **23CM/ME/SP45**

Shift : **I**

COURSE OUTCOMES (COs)

COs	Description	CL
CO1	Build conceptual knowledge and understanding on investment and securities analysis	K1
CO2	Undertake portfolio analysis to determine risk and return for portfolio construction	K2
CO3	Study the movements and fluctuation through technical charts and patterns	K3
CO4	Apply EIC approaches for investment decisions and portfolio construction	K4
CO5	Estimate the value of bonds and equities for investment decisions	K5

Week	Unit No.	Content	Cognitive Level	Teaching Hours	COs	Teaching Learning Methodology	Assessment Methods
Nov 18 – 25, 2024 (Day Order 1-6)	1	Introduction 1.1 Investment – Meaning, Definition and Objectives 1.2 Investment Alternatives 1.3 Difference between Investment, Speculation and Gambling	 K1 – K2 K1 – K4 K1 – K2	5	CO1 – CO4	Lecture and group discussion	I CA
Nov 26- Dec 3, 2024 (Day Order 1 to 6)	1	Risk and Return Analysis – Security 1.4 Security Analysis and Portfolio Management – Definition and Meaning 1.5 Principles and procedures of Portfolio Management	 K1 - K2 K1 – K5	5	CO1 – CO5	Lecture and presentation	I CA
Dec 4-11, 2024 (Day Order 1 to 6)	2	2.1 Risk – Meaning and types 2.2 Return – Meaning and components	K1 – K5 K1 – K3	5	CO1 – CO5	Lecture and group discussion	I CA
Dec 12-19, 2024 (Day Order 1 to 6)	2	2.4 Computation of Risk and return of an individual security	K1 – K5	5	CO1 – CO5	Problem solving and assignment	I CA and III Component
Dec 20, 2024 (Day Order 1)	2	2.3 Risk-return Trade off	K1 - K2	1	CO1 – CO2	Lecture and Case study	I CA and III Component
Jan 3 – 7, 2025 (Day Order 3 to 6)	3	Portfolio Analysis 3.1 Computation of Risk and return of Portfolio - Modern Portfolio Theory – Markowitz Model	K1-K5	4	CO1 – CO5	Lecture and Problem solving	I CA and III Component
Jan 8 – 17, 2024 (Day Order 1 to 6)	3	3.1 Computation of Risk and return of Portfolio - Modern Portfolio Theory – Markowitz Model (Contd.)	K1-K5	5	CO1 – CO5	Problem solving and case study	I CA and III Component

Jan 18 - 23, 2025	**C.A. Test - I**						
Jan 24 -31, 2025 (Day Order 1 to 6)	3	3.1 Computation of Risk and return of Portfolio - Single Index Model (SIM)	K1-K5	5	CO1 – CO5	Lecture and Problem solving	II CA
Feb 3-8, 2025 (Day Order 1 to 6)	3	3.1 Computation of Risk and return of Portfolio – Capital Asset Pricing Model (CAPM) 3.2 Portfolio Performance Evaluation – Sharpe's Measure, Treynor's Measure and Jensen's Measure	K1-K5	5	CO1 – CO5	Lecture and Problem solving	II CA
Feb 10– 18, 2025 (Day Order 1 to 4)	4	Equity Valuation and Bond Valuation 4.1 Equity Valuation Based on Dividend	K1-K5	4	CO1 – CO5	Lecture, Problem solving and case study analysis	II CA and III Component
Feb 19- 26, 2025 (Day Order 1-6)	4	4.2 Equity Valuation Based on Earnings – Gordon Model, Walter's Model, PE Ratio and ERP (Explicit Resale Price Methods)	K1-K5	5	CO1 – CO5	Lecture, Problem solving and case study analysis	II CA and III Component
Feb 27- Mar 6, 2025 (Day Order 1 to 6)	4	4.3 Bond Valuation – Bond Pricing, Yield to Maturity (YTM), Yield to Call (YTC)	K1-K5	3	CO1 – CO5	Lecture and Problem solving	II CA and III Component
Mar 7 – 11, 2025 (Day Order 1 to 3)	5	5.1 Fundamental Analysis 5.1.1 Economic Analysis – Theory 5.1.2 Industry Analysis – Theory	K1-K5	3	CO1 – CO5	Lecture and group discussion	II CA and III Component
Mar 12 –17, 2025	**C.A. Test - II**						

Mar 18 – 20, 2025 (Day 4 to 6)	5	5.1.3 Company Analysis	K1-K5	3	CO1 – CO5	Lecture, problem solving and case study	III Component
Mar 21 - 28, 2025 (Day Order 1 to 6)	5	5.2 Technical Analysis 5.2.1 Basic Assumptions of Technical Analysis 5.2.2 Theories, Techniques and Methods of Movement of Stock Prices 5.2.3 Important Charts and Patterns in technical Analysis	 K1 – K3 K1 – K3 K1 – K3	5	CO1 – CO5	Lecture and case study analysis	Class Discussion
Mar 29- April 2, 2025 (Day Order 1 to 3)	**REVISION**						

III Component:

- Stock Wars game – stock trading in Groups - 8 March, 2025 –(15 marks)
- Creation of an Investment portfolio for the family – Individual Assignment – 25 March, 2025 - (25 marks)
- Class participation in and presentation in group discussion, case study analysis and topics assigned on spot – (10 marks)