

STELLA MARIS COLLEGE (AUTONOMOUS), CHENNAI - 600 086
B.Com (A & F) DEGREE: ACCOUNTING AND FINANCE

SYLLABUS
(Effective from the academic year 2015 -2016)

INVESTMENT PLANNING

CODE: 15CM/UI/IP23

CREDITS: 3

OBJECTIVES OF THE COURSE

- To enable the students to acquire conceptual knowledge about investment
- To familiarize students with the process of personal investment planning

Unit 1

Introduction to Investment

- 1.1 Meaning and Need for Savings and Investment
- 1.2 Investment Decision Process
- 1.3 Types of Investments
- 1.4 Steps involved in Investment

Unit 2

Investment Environment

- 2.1 Overview of Indian Financial System – Money Market and Capital Market
- 2.2 Investment Avenues, Asset Classes and Financial Instruments
- 2.3 Security Pricing Influencing Factors and Valuation
- 2.4 Regulations governing Investment

Unit 3

Risk and Return

- 3.1 Meaning of Risk and Return
- 3.2 Types of Risk and Return
- 3.3 Measure of Risk and Return

Unit 4

Investment Performance and Evaluation

- 4.1 Diversification – Meaning and Techniques
- 4.3 Active and Passive Investment Strategies
- 4.4 Portfolio Appraisal and Revision

Unit 5

Investor Protection

- 5.1 SEBI and Role of Stock Exchange in Investor Protection
- 5.2 Investor Grievances and Redressal
- 5.3 Awareness and Activism

BOOKS FOR STUDY

Bhalla V.K, 2008, 19th edition, Investment Management, S. Chand & Co Ltd, New Delhi

Chandra, Prasanna, 3rd edition, Investment Analysis and Portfolio Management, Tata McGraw-Hill Publishing Company Limited, New Delhi

Rustagi R.P , 2013, 4th edition, Investment Analysis and Portfolio Management, Sultan Chand & Sons, New Delhi

BOOKS FOR REFERENCE

Avadhani, VA, 2011, Investments and Securities Markets in India, Himalaya Publishing House, New Delhi

Chandra, Prasanna, 2012, Investment Game How to Win, Tata Mcgraw Hill Publishing Co Ltd, New Delhi

Pandian, P., 2009, Security Analysis and Portfolio Management, Vikas Publishing House, New Delhi

JOURNALS

The Journal of Investment Strategies
The Journal of Investment Management
The Journal of Investment Consulting

WEB RESOURCES

www.investmentmanagementinstitute.com
ocw.mit.edu

PATTERN OF EVALUATION

End Semester Examination:

Total Marks:100

Duration: 3 Hours

Section A – short answers (max. 50 words) - 10 x 2 = 20 Marks

Section B – Essay answers 5 x 8 = 40 Marks (From a choice of 7)

Section C – Essay answers 2 x 20 =40 Marks (From a choice of 4)