<table>
<tr><td colspan="12">GANPAT UNIVERSITY</td></tr>
<tr><td colspan="12">FACULTY OF MANAGEMENT STUDIES</td></tr>
<tr><td colspan="2">Programme</td><td colspan="4">Bachelor of Business Administration</td><td>Branch/Spec.</td><td colspan="5">General</td></tr>
<tr><td colspan="2">Semester</td><td colspan="4">V</td><td>Version</td><td colspan="5">1.0.0.0</td></tr>
<tr><td colspan="3">Effective from Academic Year</td><td colspan="3">2026-27</td><td colspan="4">Effective for the Batch admitted in</td><td colspan="2">July 2024</td></tr>
<tr><td colspan="2">Course Code</td><td>BFIN303</td><td colspan="3">Course Name</td><td colspan="6">Investment and Portfolio Management</td></tr>
<tr><td colspan="6">Teaching Scheme</td><td colspan="6">Examination Scheme (Marks)</td></tr>
<tr><td>(Per week)</td><td colspan="2">Lecture (DT)</td><td colspan="2">Practical (Lab.)</td><td>Total</td><td></td><td>CE</td><td>SEE</td><td colspan="3">Total</td></tr>
<tr><td></td><td>L</td><td>TU</td><td>P</td><td>TW</td><td></td><td></td><td></td><td></td><td colspan="3"></td></tr>
<tr><td>Credit</td><td>04</td><td>00</td><td>00</td><td>00</td><td>04</td><td>Theory</td><td>50</td><td>50</td><td colspan="3">100</td></tr>
<tr><td>Hours</td><td>04</td><td>00</td><td>00</td><td>00</td><td>04</td><td>Practical</td><td>00</td><td>00</td><td colspan="3">00</td></tr>
<tr><td colspan="12">Pre-requisites</td></tr>
<tr><td colspan="12">Conceptual clarity on basic finance. Basic knowledge of statistics and economics.</td></tr>
<tr><td colspan="12">Course Objective</td></tr>
<tr><td colspan="12">To develop conceptual clarity and analytical ability in investment decisions, security valuation, and portfolio construction using risk–return frameworks.</td></tr>
<tr><td colspan="12">Course Outcomes</td></tr>
<tr><td colspan="12">On successful completion of the course, the students will be able to:</td></tr>
<tr><td>CO1</td><td colspan="11">Explain investment concepts, investor types, investment avenues, strategies, and risk–return relationships</td></tr>
<tr><td>CO2</td><td colspan="11">Apply bond and equity valuation models to analyse security risk and return</td></tr>
<tr><td>CO3</td><td colspan="11">Evaluate securities using fundamental and technical analysis tools for informed investment decisions.</td></tr>
<tr><td>CO4</td><td colspan="11">Construct, analyse, and evaluate portfolios using modern portfolio and capital market theories.</td></tr>
<tr><td colspan="12">Theory Syllabus</td></tr>
<tr><td>Unit</td><td colspan="10">Content</td><td>Hrs.</td></tr>
<tr><td>1</td><td colspan="10">Introduction to Investment and Risk–Return
Investment- Meaning and nature, Types and objectives of investment, Types of investors, Investment vs speculation vs gambling.
Investment Avenues- Financial and non-financial investment avenues, Investment strategies. Risk, Risk vs uncertainty, Types of investment risk: systematic and unsystematic, Measurement of return and expected return.
Risk Measurement and Diversification, Standard deviation and coefficient of variation, Portfolio risk (conceptual introduction), Benefits and limits of diversification</td><td>15</td></tr>
<tr><td>2</td><td colspan="10">Security Analysis and Valuation
Risk–Return Analysis of Securities, Risk and return for two-asset portfolios,
Bond Valuation- Present value of bonds, Yield to Maturity (YTM), Yield to call/ put.
Equity Valuation Models- Intrinsic value and market price, Dividend Discount Models, growth multi-stage models, and Relative valuation using P/E ratio.</td><td>15</td></tr>
<tr><td>3</td><td colspan="10">Fundamental Analysis and Technical Analysis
Fundamental Analysis - Meaning and relevance, E-I-C framework, Economic analysis: macroeconomic indicators, Industry analysis- industry life cycle, Company analysis: financial statement overview
Technical Analysis- Assumptions of technical analysis, Dow Theory, Types of charts: line, bar, candlestick, Types of trends and patterns
Fundamental analysis vs technical analysis</td><td>15</td></tr>
<tr><td>4</td><td colspan="10">Portfolio Management and Capital Market Theory
Portfolio Management Process,
Modern Portfolio Theory- Markowitz portfolio model, Mean–variance framework, Concept of optimum portfolio
Capital Market Theory- Capital Market Line (CML), Market portfolio, Capital Asset Pricing Model (CAPM), Security Market Line (SML)
Advanced Models, Beta and alpha coefficients, Arbitrage Pricing Theory (APT), Limitations of portfolio models</td><td>15</td></tr>
<tr><td colspan="12">Exam: Theory 80%, Numerical 20%</td></tr>
<tr><td colspan="12">Practical Content</td></tr>
<tr><td colspan="12">Practical, assignments and tutorials are based on above syllabus.</td></tr>
<tr><td colspan="12">Text Books</td></tr>
<tr><td>1</td><td colspan="11">Bhole, L. M., & Mahakud, J. (2022). Financial Markets and Institutions (7th ed.). Tata McGraw-Hill Education.</td></tr>
</table>

Reference Books	
1	Bodie, Z., Kane, A., Marcus, A. J., & Mohanty, P. (2023). Investments (12th ed.). McGraw-Hill Education.
2	Chandra, P. (2022). Investment Analysis and Portfolio Management (5th ed.). Tata McGraw-Hill Education.
3	Khan, M. Y., & Jain, P. K. (2019). Financial Management: Text, Problems and Cases (9th ed.). McGraw-Hill Education.
4	Rustagi, R. P. (2021). Investment Management: Security Analysis and Portfolio Management (5th ed.). Sultan Chand & Sons.
5	Vohra, N. D., & Bagri, G. R. (2018). A Textbook of Investment Management (2nd ed.). McGraw-Hill Education.
6	Verma, J. (2019). Portfolio Management in Practice (1st ed.). PHI Learning.

ICT/MOOCs Reference	
1	https://onlinecourses.swayam2.ac.in/ini26_cm02/preview
2	https://onlinecourses.swayam2.ac.in/imb26_mg94/preview
3	https://www.youtube.com/playlist?list=PLhdyHWHl4RG_0747kgdsKqT3SzkfvgVFi

Mapping of CO with PO and PSO:

Course Outcome (CO) No.	PO-CO Mapping								PSO-CO Mapping					
	PO1	PO2	PO3	PO4	PO5	PO6	PO7	PO8	PSO1	PSO2	PSO3	PSO4	PSO5	PSO6
CO1	3	1	1	2	1	2	3	2	3	1	2	1	1	2
CO2	2	2	1	3	1	2	3	3	2	2	2	2	2	3
CO3	2	2	1	3	1	2	3	3	2	2	3	2	2	3
CO4	2	2	1	3	2	2	3	3	2	3	3	2	2	3