

Vishnu Waman Thakur Charitable Trust's
Bhaskar Waman Thakur College of Science,
Yashvant Keshav Patil College of Commerce,
Vidhya Dayanand Patil College of Arts,
(VIVA College)



**Investment
Analysis and
Portfolio
Management
(CC-IAPM)**



Late Shri Vishnu Waman Thakur Charitable Trust's
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(VIVA College)
NAAC Accredited (CGPA 2.69)

Department of Management Studies in
Association with IQAC Organizes
Add-On Course on

INVESTMENT ANALYSIS AND PORTFOLIO MANAGEMENT

❖ Date : 27th December 2021 to 3rd March 2022



Vice-Principal & IQAC
Coordinator
Dr. Deepa Verma

Vice-Principal
Mrs. Prajakta Paranjape

Principal
Dr. A. P. Pandey



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Certificate Course- Investment Analysis, Portfolio Planning & Wealth Management syllabus

Module No.	Contents	Learning Outcome
1.Introduction to Investment Management & Tools of Investments	Investment -Meaning, Difference between Saving & Investment, Objectives of Investment, Risk & Return in Investment Investment Alternatives: Non-Marketable Financial Assets, Money Market Instruments, Bonds, Equity Shares, Derivatives, Mutual Fund Types of Investment Analysis: Fundamental Analysis-Economic Analysis, Industry Analysis, Company analysis; Technical Analysis-Variou price & volume indicators Mutual Funds: open-ended & close-ended scheme, cost of investment in Mutual funds	1. Students will understand basic financial concepts related to Investment. 2. Learners will come to know various investment alternatives. 3. Students will come to know the risk & return associated with investment alternatives.
2.Portfolio Construction & Tax Planning	Portfolio Construction - Meaning & concept, Portfolio Management Process, Objectives, Factors, Diversification Importance of early investment, Personal Financial Management, case studies on portfolio construction. Insurance - Meaning, Concept, Types of Insurance, 1. Life Insurance- Types, 2. General Insurance - Types Tax Planning - Heads of Income, Deduction, Exemption	1. Students will be able to construct their own portfolio. 2. Learners will understand the importance of early investment & personal financial management. 3. Students will come to know about tax Planning
3. Introduction to Financial Planning and Wealth Management	Background, Role of Financial Planner, Financial Planning Process Contract and Documentation Process Life Cycle and Wealth Cycle Systematic Approach to Investing Systematic Investment Plan (SIP), Systematic Withdrawal Plan (SWP), Systematic Transfer Plan (STP)	1. Students will understand overall financial planning. 2. Learners will understand the importance of wealth management based on life cycle. 3. Students will come to know Systematic Approach to Investing



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	Course Particulars	Duration (hrs)	Course Conductor
1	Module I	8-10	Prof. Padma Chari
	<u>Introduction to Investment Management & Tools of Investments</u>		
	Investment -Meaning, Difference between Saving & Investment Objectives of Investment, Risk & Return in Investment		
	Investment Alternatives: Non-Marketable Financial Assets, Money Market Instruments, Bonds		
	Investment Alternatives: Equity Shares, Derivatives, Mutual Funds		
	Types of Investment Analysis: Fundamental Analysis- Economic Analysis, Industry Analysis, Company analysis; Technical analysis-Variou price & volume indicators		
	Mutual Funds: open-ended & close-ended scheme, cost of investment in Mutual funds		
2	Module - 2	8-10	Prof. Delcy Lopes
	<u>Portfolio Construction & Tax Planning</u>		
	Portfolio Construction - Meaning & concept, Portfolio Management Process, Objectives, Factors, Diversification		
	Importance of early investment, Personal Financial Management, case studies on portfolio construction .		
	Insurance - Meaning, Concept, Types of Insurance, 1.Life Insurance- Types, 2.General Insurance - Types		
	Tax Planning - Heads of Income, Deduction, Exemption		
3	Module - 3	8-10	Prof Manoj Kurup
	<u>Introduction to Financial Planning and Wealth Management</u>		
	Background		
	Role of Financial Planner, Financial Planning Process		
	Contract and Documentation Process		
	Life Cycle and Wealth Cycle		
	Systematic Approach To Investing		
	Systematic Investment Plan(SIP) , Systematic Withdrawal Plan(SWP), Systematic Transfer Plan(STP)		



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