

SARDAR PATEL UNIVERSITY
Programme: BBA (Information Technology Management)
Semester: VII
Syllabus with effect from: November/December-2013
(Batch-2010)

Paper Code: UM07EBBI04	Total Credit:4
Title Of Paper: Investments Analysis & Portfolio Management-I	

Unit	Description in detail	Weighting (%)
I	Introduction to Investment and securities Concept of investment, security, portfolio, security analysis Characteristics of investment Objectives of investment Types of investors Investment vs speculation Investment vs gambling Investment avenues Investment opportunities for foreign citizens of Indian origin Sources of investment information Risk & Return relationships	25%
II	Markets For Financial Securities Overview of financial markets Properties of financial assets Financial Markets- Securities Market, Money Market, Capital Market, Forex Market, Derivative Market Structure of Capital Market Trading and Settlement Brief Introduction of stock exchanges- BSE, NSE, OTCEI, Inter-Connected Stock Exchange of India	25%
III	Fundamental Analysis - Economic & Industry Analysis Economic analysis Introduction to fundamental analysis Tool-Gross domestic product, Monetary policy and liquidity, Inflation, Interest rates, International influences, consumer sentiment, Fiscal policy Economic Analysis and International Investment Economic Forecasting Industry Analysis Standard industrial classification, Links between the economy and industry sectors, The stock market and the business cycle, Data needs for an industry analysis, Industry life cycle analysis, Tool-Cross sectional industry performance, Industry performance over time, Differences in industry risk, Prediction about market behavior	25%
IV	Fundamental Analysis - Company Analysis-I Porter's Model of five forces of competition The financial statements of companies - Performance ratios, profitability ratios, Market valuation ratios	25%



	Du Pont Analysis Problems in Financial Statement Analysis Guidelines in Financial Statement Analysis Going beyond the numbers	
V	Tutorial (Credit 1: Marks 25) Finance in Action SWOT Analysis of selected industries Impact of Latest union budget on different industries Determination of indices of SENSEX & NIFTY Journal on the same shall be maintained by the students. Journal shall be evaluated by the concerned teachers.	

Basic Text & Reference Books:-

- Pandian Punithavathy, Security Analysis and Portfolio Management, 2nd ed., Vikas Publishing House
- Bhalla, V.K. Investment Management: Security Analysis and Portfolio Management, S Chand, New Delhi
- Chandra Prasanna, Security Analysis and Portfolio Management, Tata McGraw Hill
- Ranganatham M., and Madhumathi R., Investment Analysis and Portfolio Management, Pearson Education
- Avadhani V A, Securities Analysis and Portfolio Management, Himalaya Publishing House
- Rustagi R P, Investment Analysis and Portfolio Management, Sultan Chand & Sons

