

SARDAR PATEL UNIVERSITY
Programme: BCOM
Semester: III
Syllabus with effect from: JUNE 2019

Paper Code: UB03DCOM23	Total Credit: 3
Title Of Paper: Investment Management	

Unit	Description in detail	Weighting (%)
1	Nature & Scope of Investment Management Meaning of Investing Investment & Speculation Significance of Investment Factors favorable for Investment Features of an Investment Program Investment Process	25 %
2	Savings & Investments Need for diversified personal investment portfolio, Avenues for investment (basic features): Non marketable financial assets <ul style="list-style-type: none"> • Time deposits, Recurring Deposits, Monthly Income Schemes, National saving Certificates, Kisan Vikas Patra, Public Provident Fund, Postal Life Insurance • Bank Savings: Fixed deposit Recurring Deposit, RBI Bonds, Infrastructure bonds by ICICI & IDBI 	25 %
3	Personal finance Introduction, Goals & Importance of Personal Financial Management Financial Planning & Budgeting (With examples on Preparation of Family Cash Budget, personal income & expenditure A/c & Balance sheet) Some tax planning tips for personal incomes	25 %
4	Insurance Life Insurance-Basic features of endowment assurance, Money back Plan, Whole life assurance & term assurance General Insurance-Introduction & basic features of Vehicle insurance,Medical Insurance, Accident insurance & liability insurance-Calculation of premium & settlement of claims	25 %

Basic Text & Reference Books

- Securities Analysis & Portfolio Management-Avadhani V A
- Investment Management-Prasanna Chandra
- Investment Analysis & Portfolio Management –Ranganatham M & Madhumati R
- Investment Management: Security analysis & Portfolio Management-Bhalla VK

