

**SARDAR PATEL UNIVERSITY**  
**Programme: BCOM**  
**Semester: III**  
**Syllabus with effect from: JUNE 2020**

<b>Paper Code:</b> UB03DCOM53	<b>Total Credit: 3</b>
<b>Title Of Paper:</b> Investment Management	

Unit	Description in detail	Weighting (%)
<b>1</b>	<b>Nature &amp; Scope of Investment Management</b> Meaning of Investing Investment & Speculation Significance of Investment Factors favorable for Investment Features of an Investment Program Investment Process	<b>25 %</b>
<b>2</b>	<b>Savings &amp; Investments</b> Need for diversified personal investment portfolio, Avenues for investment (basic features): Non marketable financial assets <ul style="list-style-type: none"> <li>• Time deposits, Recurring Deposits, Monthly Income Schemes, National saving Certificates, Kisan Vikas Patra, Public Provident Fund, Postal Life Insurance</li> <li>• Bank Savings: Fixed deposit Recurring Deposit, RBI Bonds, Infrastructure bonds by ICICI &amp; IDBI</li> </ul>	<b>25 %</b>
<b>3</b>	<b>Personal finance</b> 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	<b>25 %</b>
<b>4</b>	<b>Insurance</b> 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	<b>25 %</b>

**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

