Vision

To be a Globally Renowned B-School that imparts enterprising knowledge & skills that best serves the stakeholders and mankind.

Mission

Mission statement - 1	Promote Excellence in Business Education and Skill Development
Mission statement - 2	Nurture Entrepreneurship, Human Values, Social Responsibilities and Global Citizenship
Mission statement - 3	Enrich the Creativity, Research and Innovation in all Activities
Mission statement - 4	Collaborate to foster Personal and Institutional Leadership Effectiveness

Programme Educational Objectives (PEO)

PEO - 1	Graduates will be business leaders and managers with leadership and problem-solving skills for global business.
PEO - 2	Graduates will drive entrepreneurship initiatives either on their own or within other organizations where they are employed.
PEO - 3	Graduates will have innovation skills and drive the businesses through multifaceted skills.
PEO - 4	Graduates will provide advancement of conceptual and practical knowledge in the field of business management to contribute to nation building while upholding ethical practices.

Mapping Mission of the department to the Programme Educational Objectives

	Mission Statement - 1	Mission Statement - 2	Mission Statement - 3	Mission Statement - 4
PEO - 1	H	M	H	H
PEO - 2	M	H	H	L
PEO - 3	H	M	M	M
PEO - 4	H	L	M	M

H – High Correlation, M – Medium Correlation, L – Low Correlation

Programme Learning Outcomes (PLO)

PLO - 1	Apply knowledge of management theories and practices to solve business problems.
PLO - 2	Foster Analytical and critical thinking abilities for data-based decision making.
PLO - 3	Ability to develop Value based Leadership ability.
PLO - 4	Ability to understand, analyze and communicate global, economic, legal, and ethical aspects of business.
PLO - 5	Ability to lead themselves and others in the achievement of organizational goals, contributing effectively to a team environment.

Mapping of Programme Educational Objectives to Programme Learning outcomes & PSO

	PLO -1	PLO - 2	PLO - 3	PLO- 4	PLO - 5
	Graduate Attributes				
PEO - 1	H	H	H	M	H
PEO - 2	L	L	L	L	M
PEO - 3	H	H	H	M	L
PEO - 4	H	M	L	H	H

H – High Correlation, M – Medium Correlation, L – Low Correlation

Course code	MB20FM01	Course name	Investment Analysis and Portfolio Management	Course category	E	Functional Elective	L	T	P	C
							3	0	2	4
Pre-requisites courses	Nil	**Co - Requisites courses**	NIL		**Progressive courses**		NIL			
Course offering Department	MBA			Data book / codes / standards			Nil			

Course learning Rationale (CLR)	The purpose of learning of this course to	Learning			Program Learning outcomes (PLO)						
CLR -1	Develop a basic understanding of the investments field and investment environment	1	2	3	PLO -1	PLO -2	PLO -3	PLO -4	PLO -5	PSO -1	PSO -2
CLR -2	Comprehend the functionalities of the securities market and its components										
CLR -3	Practice the tools and techniques of individual securities and portfolio analysis										
CLR -4	Analyze, value and forecast the securities performance using various models										
CLR -5	Exhibit the capacity to construct portfolios and arrive at optimal portfolios										

Course Learning outcomes (CLO)	At the end of the course, learners will be able	Blooms level (1-6)	Expected Proficiency (%)	Expected attainment (%)	Apply knowledge of management theories and practices to solve business problems	Foster Analytical and critical thinking abilities for data-based decision making	Ability to develop Value based Leadership ability	Ability to understand, analyze and communicate global, economic, legal, and ethical aspects of business.	Ability to lead themselves and others in the achievement of organizational goals, contributing effectively to a team environment.		
CLO – 1	Demonstrate a basic understanding of investments and the nuances of investing	3	75	80	H	L	L	M	M		
CLO – 2	Exhibit the acquaintance of the securities market and its constituents	3	75	80	H	H	L	L	M		
CLO – 3	Apply knowledge gained to perform analysis of various securities	4	75	80	H	H	L	L	H		
CLO – 4	Analyze and apply models to securities performance and forecasting	4	75	80	H	H	H	L	L		
CLO – 5	Construct optimal portfolios and evaluate them using models	5	75	80	M	H	L	H	L		

Duration (Hour)		Learning Module / Unit 1	Learning Module / Unit 2	Learning Module / Unit 3	Learning Module / Unit 4	Learning Module / Unit 5
		8	**8**	**8**	**8**	**8**
S -1	SLO -1	Introduction to Investment	Securities Market - meaning	Fundamental analysis - meaning	Valuation of Securities - meaning	Portfolio Management - meaning
	SLO- 2	Investment – Meaning and Definition	Capital market – Primary market and Secondary market	Economic analysis – meaning and macro-economic variables	Valuation of Equity - meaning	Steps in Portfolio Construction
S -2	SLO -1	Investment Objectives	Process of IPO	Economic forecasting and Stock Investment Decisions	Dividend Discount Model	Diversification
	SLO- 2	Investment Process	FPO	Industry analysis – meaning	Zero Growth Model	Types of Diversification
S -3	SLO -1	Avenues of Investment I	Listing of Securities	Industry classification	Constant Growth Model	Portfolio Risk and Return analysis – simple problems
	SLO- 2	Avenues of Investment II	Secondary market trading and operations	Industry life cycle	Valuation of Preference shares	Markowitz Portfolio Selection Model
S -4	SLO -1	Investment and Speculation	Regulating bodies – SEBI	Evaluating Industry Relevant factors	Simple problems	Portfolio Evaluation – meaning
	SLO- 2	Investment information	Stock exchanges in India	Company Analysis – meaning	Valuation of Bonds	Jenson Index
S -5	SLO -1	Risk and Return	BSE and NSE	Forecasting earnings	YTM	Sharpe Index
	SLO- 2	Risk - Meaning	SEBI Act	Technical Analysis – meaning	YTC	Treynor's Index
S -6	SLO -1	Types of Risk	Securities Contract Regulation Act	Different tools and techniques	Arbitrage Pricing Theory (APT)	Portfolio Revision
	SLO- 2	Risk Return Trade off	Index Calculation – types of indices	Rate of Change (ROC)	Capital Asset Pricing Model (CAPM)	Optimal Portfolio
S -7	SLO -1	Risk Exposure- Expected Return	Methods of calculating indices	Moving Average Convergence Divergence (MACD)	Capital Asset Pricing Model (CAPM)	Simple problems
	SLO- 2	Calculation of Expected return – simple problems	Global Index	Oscillators-Trends – Relative Strength Index	Efficient Market Hypothesis (EMH)	Summary and revision with extra problems
S -8	SLO -1	Risk and Return analysis of individual securities - Standard Deviation	Global exchanges	Overview of other indicators	Case study	Case study
	SLO- 2	Summary and Revision with extra problems	Practical session on Functioning of stock exchanges using Yahoo Finance, Google Finance	Practical session on Technical analysis tools	Activity: Presentation	Activity: Presentation

Learning Resources	1. Security Analysis and Portfolio Management, VA Avadhani Pearson Publications.
	2. Fundamentals of Investment Management, Hirt and Block, Tata McGraw Hill. Ed 2009.
	3. Portfolio Management Handbook, Robert A. Strong, Jaico Publishing House, Mumbai

Learning Assessment

Blooms level		Continuous learning Assessment (50% weightage)										Final Examination (Marks 100 which will be weight 50%)	
		CLA - 1 (5 %)		CLA - 2 (10 %)		CLA - 3 (15 %)		CLA - 4 (15 %)		CLA - 5 (5 %)		Theory	Practice
		Theory	Practice	Theory	Practice	Theory	Practice	Theory	Practice	Theory	Practice		
1	Remember												
2	Understand	15%	15%										
3	Apply	20%	20%	10%		10%	10%	10%	10%	25%	25%	10%	10%
4	Analyse	15%	15%		10%	10%	10%	10%	10%	25%	25%	10%	10%
5	Evaluate			20%	20%	10%	10%	10%	10%			10%	10%
6	Create			20%	20%	15%	15%	20%	20%			20%	20%
	Total	100%		100%		100%		100%		100%		100%	

#CLA – 3: Mini project / Seminar (5), Assignments (5), MCQ assessment (5) / MOOC certification or NPTEL   **# CLA – 4: Active participation in class / seminar presentation**

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