

**St. Joseph's College of Commerce (Autonomous)
#163, Brigade Road, Bangalore – 560 025**

PREPARATION OF LESSON PLAN

UG DEPARTMENT

Subject Name: Securities Analysis and Portfolio Management (SAPM)

Lecture hours: 60

Objective: To familiarize the students with various crucial factors to be considered while managing finance of a concern. To understand international finance, their Markets, instruments and its risks and working, to working with various stock portfolio constructions, to expose students towards various financial analysis.

Module Number	UNIT & OBJECTIVES	No. of Lecture Hours	Methodology/ Instructional techniques	Evaluation / learning confirmation
I	Understanding Students Knowledge about the subject	7+1	Questioner	---
	Introduction to Savings and Investment	1	Discussion	
	Financial and Economical Meaning of Investment	1	Discussion	Assignment
	Investment vs. Speculation, Gambling, Hedging, Arbitrage.	1+2	Discussion	
	Meaning of Security, Security Analysis-Portfolio Management	1	Discussion	
	Importance/Significance of Portfolio Management	1	Discussion	
II	Investment Avenues and Risk Analysis	9		
	Investment Avenues-Introduction	1		
	Factor Influencing Investment Decision	1	Discussion	
	Financial Instruments and Non-Financial Instruments-Tax Benefits, Risk and Return	1+2	Discussion	Assignment
	Selection of Security using Life Cycle, and Income Approach	1+1	Discussion	
	Analysis of Systematic and Un systematic Risk	1+1	PPT/Discussion	
III	Fundamental Analysis and Technical Analysis	14		
	Fundamental analysis –Return Analysis	1+1	Theory and Concepts	
	Risk Evaluation- Meaning of few Statistical	1+1	Discussion	

	Terms			
	Risk Evaluation-Mean, Variance and SD, Co-efficient. Calculation	1+1	Calculation	Assignment
	Beta Calculation	1+1	Calculation	
	Factor influencing Valuation of Securities	1+1	Calculation	
	Pricing of Stock	1+1	Calculation	
	Yield Calculation of Fixed Income Securities	1+1	Calculation	
IV	Technical Analysis and Related Theories	10		
	Technical Analysis Theories and Concepts	1+1	Live Chart	
	Tools in Technical Analysis	1+1	Live Chart	Assignment
	Dow Theory	1+1	Discussion	
	Efficient Market Hypothesis	1+1	Discussion	
	Random Walk Theory	1+1	Discussion	
V	Portfolio Construction and Revision	12		
	Capital Assets and Pricing Model (CAPM)	1+1	Calculation/Discussion	
	Arbitrage Pricing Theory	1+1	Calculation	Assignment
	Construction of Portfolio using Markowitz	1+1	Calculation/Discussion	
	Sharpe's Model-Portfolio Construction	1+1	Calculation	Assignment
	Jenson's Model- Portfolio Construction	1+1	Calculation	
	Treynor's Model- Portfolio Construction	1+1	Calculation	

Books for Reference:

- ❖ Puneethavathi and Pandian: Securities Analysis and Portfolio Management
- ❖ Prasanna Chandra: Managing Investments.
- ❖ Fisher and Jordan: Investment Management.
- ❖ Bhalla: Securities Analysis and Portfolio Management.
- ❖ Avadhani: Securities Analysis and Portfolio Management.

Prepared by
Giridhar Naidu B

Approved by