

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

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 Financial Markets, instruments and its risks and working, to working with various stock portfolio constructions, to expose students towards various financial analyses.

Module Number	UNIT & OBJECTIVES	No. of Lecture Hours	Methodology/ Instructional techniques	Evaluation/ learning confirmation
I	Understanding Students Knowledge about the subject	10	Questioner	---
	Introduction to Savings and Investment	1	Discussion	Question and Answer
	Financial and Economical Meaning of Investment	1	Discussion	Assignment
	Investment vs. Speculation, Gambling, Hedging, Arbitrage.	3	Discussion	Question and Answer
	Meaning of Security, Security Analysis-Portfolio Management	3	Discussion	Question and Answer
	Importance/Significance of Portfolio Management	2	Discussion	Question and Answer
II	Investment Avenues and Risk Analysis	10		
	Investment Avenues-Introduction	1		Question and Answer
	Factor Influencing Investment Decision	1	Discussion	Question and Answer
	Financial Instruments and Non-Financial Instruments-Tax Benefits, Risk and Return	3	Discussion	Assignment
	Selection of Security using Life Cycle, and Income Approach	2	Discussion	Question and Answer
	Analysis of Systematic and Un systematic Risk	3	PPT/Discussion	Question and Answer
III	Fundamental Analysis and Technical Analysis	16		
	Fundamental analysis -Return Analysis	2	Theory and Concepts	MCQs
	Risk Evaluation- Meaning of few Statistical Terms	2	Discussion	Question and Answer
	Risk Evaluation-Mean, Variance and SD, Co-efficient. Calculation	3	Calculation	Assignment

	Beta Calculation	2	Calculation	Problems
	Factor influencing Valuation of Securities	2	Discussion	Question and Answer
	Pricing of Stock	3	Calculation	Problems
	Yield Calculation of Fixed Income Securities	2	Calculation	Problems
IV	Technical Analysis and Related Theories	10		
	Technical Analysis Theories and Concepts	2	Live Chart	Question and Answer
	Tools in Technical Analysis	2	Live Chart	Assignment
	Dow Theory	2	Discussion	Question and Answer
	Efficient Market Hypothesis	2	Discussion	Question and Answer
	Random Walk Theory	2	Discussion	Question and Answers
V	Portfolio Construction and Revision	14		
	Capital Assets and Pricing Model (CAPM)	3	Calculation/Discussion	Problems
	Arbitrage Pricing Theory	2	Calculation	Assignment
	Construction of Portfolio using Markowitz	3	Calculation/Discussion	Question and Answer
	Sharpe's Model-Portfolio Construction	2	Calculation	Assignment
	Jenson's Model- Portfolio Construction	2	Calculation	Question and Answer
	Treynor's Model- Portfolio Construction	2	Calculation	Question and Answer

Books for Reference:

- ❖ Puneethavathi 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
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Approved by