

SES's L.S. RAHEJA COLLEGE OF ARTS AND COMMERCE

(AUTONOMOUS)



Syllabus of Basics of Investment Analysis under NEP 2020 vertical SEC with effect from 2024-25

DEPARTMENT OF BACHELOR OF COMMERCE (ACCOUNTING AND FINANCE)

HoD/Coordinator of the Department: Dr. Vaishali Pandya

Date of approval by the BoS: 27th April, 2024

Approved by the Academic Council: 29th April, 2024

Ratified by the Governing Body: 6th May, 2024



Programme: Bachelor of Commerce (Accounting and Finance)		Semester: II				
Course: Basics of Investment Analysis Academic Year: 2024-2025 Batch: 2024-2027		Code: UGBAFIISEC224				
Teaching Scheme	Evaluation Scheme					
Lectures	Practical	Tutorials		Credits	Internal Continuous Assessment (ICA) (weightage)	Term End Examinations (TEE) (weightage)
30	Nil	Nil		2	20 Marks	30 Marks

Learning Objectives:	<ol style="list-style-type: none"> 1. To enable them to understand various types of Investment avenues and types of risk 2. To enable the students with basic understanding on analysis of the financial statements. 3. To understand the concepts of Personal financing and Tax planning. 4. To enable them to understand Pre, Post-retirement strategies and understand the Types of Insurance.
Learning Outcomes:	<ol style="list-style-type: none"> 1. Learners will be able to understand various Investment avenues and types of risk. 2. Learners will be able to analyse and interpret financial statements. 3. Learners will be able to understand how to do personal financing and tax planning. 4. Learners will be aware of Insurance planning, Pre and Post retirement strategies for investment.
Pedagogy:	Classroom teaching, case-studies, group discussions, problem solving

Module	Module Content	Module Wise Duration/Lectures
I	<p>Investment Avenues-Shares, Mutual funds, Equity, Bonds, Debentures, Foreign exchange market, Spot forward rate, real estate, NPS, REIT's and various other investments.</p> <p>Management- Concept of Risk, Sources of Risk, Understanding different types of risk, Risk management process.</p> <p>Understanding Financial statements: Balance Sheet, Income statement, Cash flow.</p>	15

II	<p>Personal Finance - Rules of Investment, Investment decisions according to age.</p> <p>Tax planning for Investment-Income tax saving schemes</p> <p>Retirement planning-Introduction, Purpose and need, Pre and post retirement strategies</p> <p>Insurance Planning-Principles, Characteristics, types of Insurance, HLV</p>	15
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REFERENCE BOOKS

1. V. (2008, June 1). Investment Management (Security Analysis and Portfolio Management), 19th Ed. S. Chand Publishing
2. Prasanna, C. (2012, January 1). Investment Analysis and Portfolio Management.
3. Singh, P. (2006, January 1). Investment Management
4. Chandra, P. (2007, January 1). Financial Management. Tata McGraw-Hill Education
5. V. (2008, June 1). Investment Management (Security Analysis and Portfolio Management), 19th Ed. S. Chand Publishing
6. Chauhan, M. (n.d.). 16 Personal Finance Principles Every Investor. NETWORK 18 PUBLICATIONS LTD.
7. Khan, M. Y. (2013, January 1). Indian Financial System. Tata McGraw-Hill Education
8. Machiraju, H. (2010, January 1). Indian Financial System, 4th Edition. Vikas Publishing House
9. Hopkin, P. (2013, May 3). Risk Management. Kogan Page Publishers
10. Suri, R. S. (2016, March 14). Share Market Basics for Indian Share Market : Indian Share Market for Beginners. AP Publishing

Note: Latest edition of textbooks may be used.