SWARNANDHRA
COLLEGE OF ENGINEERING & TECHNOLOGY
(AUTONOMOUS)

Accredited by National Board of Accreditation, AICTE, New Delhi,Accredited by NAAC with "A" Grade – 3.32 CGPA,Recognized under 2(f) & 12(B) of UGC Act 1956, Approved by AICTE, New Delhi,Permanent Affiliation to JNTUK, Kakinada
Seetharampuram, W.G.DT., Narsapur-534280, (Andhra Pradesh)

DEPARTMENT OF MASTER OF BUSINESS ADMINISTRATION

Course Code	Course Title	Semester	Branches	Contact Periods /Week	Academic Year	Date of commencement of Semester
24MB3E05	INVESTMENT & PORTFOLIO MANAGEMENT	III	MBA	5	2025-26	11/08/2025

COURSE OUTCOMES:

CO1: To provide a theoretical and practical background in the field of investments. (K2)

CO2: Assess the Risk and Returns of securities and valuing equity and Debt instruments. (K4)

CO3: Understand and analyze the factors using fundamental and technical analysis while making investment decisions. (K1)

CO4: Designing and managing the Bond as well as equity portfolios in the real world. (K5)

CO5: Evaluate and measure the portfolio performances. (K4)

Unit No.	Outcome	Topic/Activity		Ref. Text Book	Total Periods	Delivery Method
1	CO1: To provide a theoretical and practical background in the field of investments (K2)	**UNIT I – INTRODUCTION**				
		1.1	Concept of Investment, Investment Vs Speculation, and Security Investment Vs Non security Forms of Investment	T1,T2,R1	2	Chalk & Talk PPT Tutorial
		1.2	Investment Environment in India.	T1,T3,R1	1	
		1.3	Investment Process - Sources of Investment Information	T1,T2,R1	2	
		1.4	Security Markets – Primary and Secondary	T1,T3,R1	2	
		1.5	Types of securities in Indian Capital Market	T1,T2,R1	1	
		1.6	Market Indices	T1,T3,R1	1	
		1.7	Calculation of SENSEX and NIFTY	T1,T2,R2	1	
		UNIT II – RISK & RETURN				

2	CO2: Assess the Risk and Returns of securities and valuing equity and Debt instruments. (K4)	2.1	Return and Risk – Meaning and Measurement of Security Returns. - Preference Shares and Equity Shares.	T1,T2,R3	2	Chalk & Talk, PPT Tutorial
		2.2	Meaning and Types of Security Risks:	T1,T2,R3	1	
		2.3	Systematic Vs Non-systematic Risk, Measurement of Total Risk	T1,T2,R3	2	
		2.4	Intrinsic Value Approach to Valuation of Bonds	T1,T2,R3	1	
		2.5	Intrinsic Value Approach to Valuation of Preference Shares and Equity Shares.	T1,T2,R3	2	
		2.6	Case Studies	T1,T2,R3	3	
3	CO3: Understand and analyze the factors using fundamental and technical analysis while making investment decisions. (K1)	**UNIT III FUNDAMENTAL ANALYSIS**				
		3.1	Fundamental Analysis	T1,T2,R1	1	Chalk & Talk, PPT Tutorial, Active learning & case study
		3.2	Economy, Industry and Company Analysis	T1,T2,R1	2	
		3.3	Technical Analysis – Concept and Tools and Techniques Analysis	T1,T2,R1	1	
		3.4	Technical Analysis Vs Fundamental Analysis	T1,T2,R1	1	
		3.5	Efficient Market Hypothesis;	T1,T2,R1	1	
		3.6	Concept and Forms of Market Efficiency.	T1,T2,R1	1	
		3.7	Case Studies	T1,T2,R1	3	
4	CO4: Designing and managing the Bond as well as equity portfolios in the real world. (K5).	**UNIT IV PORTFOLIO MANAGEMENT**				
		4.1	Elements of Portfolio Management,	T1,T2,R1	1	Chalk & Talk, PPT Tutorial,
		4.2	Portfolio Models	T1,T3,R1	1	
		4.3	Markowitz Model	T1,T2,R1	1	
		4.4	Efficient Frontier and Selection of Optimal Portfolio	T1,T3,R1	1	
		4.5	Sharpe Single Index Model	T1,T3,R1	2	
		4.6	Capital Asset Pricing Model	T1,T2,R1	1	
		4.7	Arbitrage Pricing Theory	T1,T3,R1	1	
		4.8	Case Studies	T1,T2,R1	3	

		UNIT V PERFORMANCE EVALUATION				
	CO5: Evaluate and measure the portfolio performances. (K4)	5.1	Performance Evaluation of Portfolios- a).Treynor's Model	T1,T3,R1	3	Chalk & Tutorial, & Project Based Learning
		5.2	b). Sharpe's Model	T1,T2,R1	1	
		5.3	c). Jensen's Model for PF Evaluation	T1,T3,R1	1	
		5.4	Evaluation of Mutual Fund.	T1,T3,R1	1	
		5.5	Types of mutual funds	T1,T2,R1	1	
		5.6	Case Studies	T1,T3,R1	3	
			CASE STUDIES	T1,T2,R1	5	
			REVISION		5	
				TOTAL	63	

Text Books:

T1 S.Kevin, SAPM, Himalaya Publishers.

T2 Bhalla, VK Investment Management, S.Chand., New Delhi

T3 Investment Analysis and Portfolio Management, Prasanna Chandra, Tata McGraw-Hill, 3rd Edition, 2010, New Delhi

Reference Books:

R1 Fisher DE and Jordon RJ, Security Analysis and Portfolio Management, PHI, New Delhi

R2 Preeti Singh, Investment Management, Himalaya Publishers.

R3 Ambika Prsasad Dash, Security Analysis and Portfolio Management, IK Int Pub House, New Delhi

		Name	Signature with Date
i.	Faculty	Dr. Grace Ganta	
ii.	Course Coordinator	Dr. O.V.A.M.Sridevi	
iii.	Module Coordinator	Ms. Haleena	Haleena
iv	Programme Coordinator	Dr. G. Grace	

Principal
PRINCIPAL
Swarnandhra College of Engineering & Technology
SEETHARAMAPURAM
NARSAPUR - 534 280. W.G.Dt.