



ANDHRA PRADESH STATE COUNCIL OF HIGHER EDUCATION

SKILL COURSE

w.e.f. AY 2023-24

SEMESTER-II

INVESTMENT PLANNING

Credits: 2

2 hrs/week

Course Objectives:

The objective of the course is to make the students familiarise with the concepts of investment, associated risks along with the regulatory authorities that monitor the capital market.

UNIT - I

Investment: Attributes of Investment, Investment and speculation, Features of a good Investment, Investment Process. Investment Avenues – Types. Tax saving options.

UNIT - II

Return and Risk: Meaning and Measurement of Security Returns. Meaning and Types of Security Risks- Systematic Vs Non-systematic Risk. Measurement of Total Risk - Intrinsic Value Approach to Valuation of Bonds and Shares.

UNIT - III

Portfolio: Choosing the right Investment options, Construction of Investment portfolio, and Portfolio management. Investor Protection Guidelines of SEBI– SEBI Investment Advisors Regulations.

Hands on Activities:

1. Group/Individual presentations on Investment Alternatives (Advantages, Suitability and Limitations).
2. Calculation of Stock Return and Risk from historical data of NSE and BSE.
3. To make comparative analysis between various stocks using excel.

References:

1. Prasanna Chandra, Investment Analysis and Portfolio Management, Tata McGraw Hill.
2. Bhalla VK, Investment Management, S.Chand.
3. Donald E.Fischer, Ronald J.Jordan, Security Analysis and Portfolio Management; Prentice Hall of Inida.
4. Preeti Singh, Investment Management, Himalaya Publishers.
5. Pitabas Mohanty Spreadsheet Skills for Finance Professionals Taxmann Publications.