GC-CST2: BASICS OF SECURITY ANALYSIS AND PORTFOLIO MANAGEMENT

Max. Marks: 100
External: 70
Internal: 30
Pass: 40%
Credits: 6

SECTION A

Unit I Security Analysis (Fundamental): Meaning and Need of Fundamental Analysis, Factors affecting Economic Analysis, Industry Analysis and Company Analysis;

Unit II Techniques used in Economic Analysis, Industry Analysis and Company Analysis

Unit III: Security Analysis (Technical): Meaning and Need of Technical Analysis; Principles of Technical Analysis;

Unit IV: Theories of Technical Analysis – The Dow Theory, Elliot Wave Theory, Random Walk Theory; Charting Techniques; Market Indicators; Support and Resistance Levels; Interpretation of Price Patters; Differences between Fundamental Analysis and Technical Analysis

SECTION B

Unit V: Portfolio Management: Meaning, definition and significance of Portfolio management, Process of portfolio management

Unit VI: Portfolio Theories, Markowitz Model of Risk – Return Optimisation; Capital Market Theory; Sharpe Model Index; Capital Asset Pricing Model (CAPM); Arbitrage Pricing Theory Model

Unit VII: Portfolio Evaluation Methods, Portfolio Revision and Rebalancing; Asset Allocation Strategies; Fixed Income Portfolio

Suggested Reading:

1. Bhalla, V.K. —Management of Financial Servicesl, Anmol Publications Pvt. Ltd., New Delhi.
2. Pathak, Bharati, —Indian Financial Systeml, Pearson Education, New Delhi
3. Peter S. Rose, Sylvia C. Hudgins, (2010). Bank Management and Financial Services, 7/e; New Delhi: Tata McGraw Hill.
4. Padmalatha Suresh, Justin Paul, (2010). Management of Banking and Financial Services, 2/e; New Delhi: Pearson Education.
5. Khan, M.Y. (2013). Financial Services, 7/e; New Delhi: Tata McGraw-Hill.
6. Machiraju, H.R (2014). Merchant Banking: Principles and Practice, 4/e; New Age International.
7. Gurusamy, S. (2013). Merchant Banking and Financial Services, $/e; New Delhi: Tata McGraw-Hill