PAPER-CCFNF 3

INVESTMENT MANAGEMENT

MAX. MARKS: 100

EXTERNAL: 70

INTERNAL: 30

PASS: 40%

Credit-6

OBJECTIVE

This course aims to introduce students to the principles, practices, and emerging trends in investment management. It equips learners with the knowledge required to understand investment products, assess risk-return relationships, and make informed investment decisions. The course further promotes financial literacy through practical applications in personal financial planning and investment evaluation.

COURSE OUTCOME

CO1 Describe concepts and approaches of investment management.

CO2 Explain investment products and fund structures.

CO3 Assess investment risk and return characteristics.

CO4 Apply financial literacy tools to investment planning.

CO5 Evaluate investment decisions using practical case studies.

SECTION-A

Basic Knowledge of Investment

- Investment Management: Basic concepts, features, theory, and applications.
- Investment Funds: Context, structure, strategies.
- Trading, Risk Management, Investing for taxable clients.
- Hedge Funds, Alternative Investments, Socially Responsible Investing, Corporate Engagement, and CSR.
- Investment management during financial crises.

SECTION-B

Investment & Financial Literacy Project

Project and Case Studies May Include:

1. Analysis of **financial statements** of companies.
2. Calculation of **interest and present value** for evaluating financial plans:
    - Amortizing loans
    - Retirement planning
    - Investment plans
3. Examples of financial planning evaluation:
    - Investing Rs.100,000 at 15% interest for 8 years.
    - Cost of an automobile Rs.80,000, interest 5%, amount to set aside now.
    - 30-year mortgage loan of Rs.20,00,000 at 10% interest:
        - Total monthly payment
        - Portion of first month's payment toward loan principal
        - Payment toward principal after 2 years

REFERENCES

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- Brigham, E. F., & Ehrhardt, M. C. *Fundamentals of financial management* (16th ed.). Cengage Learning.
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- Fischer, D. E., & Jordan, R. J. *Security analysis and portfolio management* (9th ed.). Pearson Education.
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