JHARKHAND Rai University
UGC RECOGNISED UNIVERSITY
ACCREDITED BY NAAC

Lesson Plan & Tracking

Programe : MBA	Session : Fall 2022	Year : 2022-23	Sem: III

Course: Investment Analysis & Portfolio Management

Name of the Faculty: Dr Harmeet Kaur	Commencement Date: 12 September 2022	Date of Closure:

Lecture No.	Week	Unit	Topics to be Covered	Blended Mode: ICT Tool/Platform/ LMS/Physical	Blended Mode: Resources	Blended Mode: Activity	Date	Duration	Tracking of Lectures	Related Course Outcome	Signature of Faculty	Signature of HoD	Remarks (if any)
1	1	1	Investment Policy:- investment objectives,Philosophy of individual & Institutional investors, investment constraints	Physical/LMS	Lecture Material/ PPT								
2		1	Determination of investment policies and investment constraints	Physical/LMS	Lecture Material/ PPT								
3		1	Organization and functions of securities market	Physical/LMS	Lecture Material/ PPT								
4		1	Security Market Index	Physical/LMS	Lecture Material/ PPT								
5	2	1	Security Credit Rating & Capital Market Reforms	Physical/LMS	Lecture Material/ PPT								
6		2	Introduction to Fundamental Analysis & Economic Analysis: Concept & Significance	Physical/LMS	Lecture Material/ PPT								
7		2	Economic Analysis	Physical/LMS	Lecture Material/ PPT								
8		2	Industry analysis	Physical/LMS	Lecture Material/ PPT								
9	3	2	Industry analysis	Physical/LMS	Lecture Material/ PPT								
10		2	company analysis: features of a company, historical financial performance	Physical/LMS	Lecture Material/ PPT								
11		2	Approaches to equity valuation	Physical/LMS	Lecture Material/ PPT								

12			Assessment 1	Physical/LMS									
13	4	2	Measures of relative values	Physical/LMS	Lecture Material/ PPT								
14		2	Measures of relative values	Physical/LMS	Lecture Material/ PPT								
15		2	Technical analysis:- concept, trading rules, indicators	Physical/LMS	Lecture Material/ PPT								
16		2	Dow theory, charting	Physical/LMS	Lecture Material/ PPT								
17	5	2	Price patterns	Physical/LMS	Lecture Material/ PPT								
18		2	Price Pattern & Elliot wave theory	Physical/LMS	Lecture Material/ PPT								
19		2	Efficient Market Hypothesis	Physical/LMS	Lecture Material/ PPT								
20		2	Efficient Market Hypothesis	Physical/LMS	Lecture Material/ PPT								
21	6	3	Introduction to Portfolio Management	Physical/LMS	Lecture Material/ PPT								
22		3	Portfolio analysis:- effects of combining securities, Markowitz risk return optimization, risk and investor preferences	Physical/LMS	Lecture Material/ PPT								
23		3	Significance of beta, CAPM, SML,CML	Physical/LMS	Lecture Material/ PPT								
24			Assesment 2	Physical/LMS									
25	7	3	Significance of beta, CAPM, SML,CML	Physical/LMS	Lecture Material/ PPT								
26		3	Arbitrage pricing model	Physical/LMS	Lecture Material/ PPT								
27		3	Bond Portfolio Management Strategies	Physical/LMS	Lecture Material/ PPT								
28		3	Bond Portfolio Management Strategies	Physical/LMS	Lecture Material/ PPT								

29	8	4	Performance Evaluation of Portfolio	Physical/LMS	Lecture Material/ PPT								
30		4	Performance Evaluation of Portfolio	Physical/LMS	Lecture Material/ PPT								
31		4	Portfolio Revision	Physical/LMS	Lecture Material/ PPT								
32		4	Portfolio Revision	Physical/LMS	Lecture Material/ PPT								
33	9	4	Mutual Funds	Physical/LMS	Lecture Material/ PPT								
34		4	Mutual Funds	Physical/LMS	Lecture Material/ PPT								
35		4	Mutual Funds	Physical/LMS	Lecture Material/ PPT								
36			Revision & Model Paper Discussion	Physical/LMS	Discussion								