

SECURITY ANALYSIS AND PORTFOLIO MANAGEMENT

Sem	Subject Code	Category	Lecture		Theory		Practical	Credits
IV	21CPCO4C	Core XV	6 hrs per week	90	6 hrs per week	90	NIL	5

COURSE OBJECTIVES:

- To provide a basic knowledge of the Concepts of Security Analysis and the framework of Fundamental Analysis, this helps in taking investment decisions.
- To acquaint students with some fundamental concepts such as Risk, Portfolio selection and Management.

COURSE OUTCOMES:

On successful completion of the course, the student will be able

CO NUMBER	CO STATEMENT	KNOWLEDGE LEVEL (K1-K4)
CO1	To Introduce the nature and scope of Investment and Security Analysis	K1
CO2	To Analyse the various aspects of Security Analysis, Risk and framework of Economic Analysis	K2
CO3	To Understand the concept of Company analysis and Industry analysis	K2
CO4	To understand the Technical Analysis and tools for Technical Analysis	K2
CO5	To understand the concept of Portfolio management its process, selection and revision	K3

Knowledge Level: K1- Remember; K2 –Understand; K3 – Apply; K4 –Analyse

MAPPING WITH PROGRAMME OUTCOMES:

COS	PO1	PO2	PO3	PO4	PO5	PO6
CO1	S	S	M	S	S	M
CO2	S	M	S	M	M	M
CO3	M	M	S	M	S	M
CO4	M	M	M	M	M	M
CO5	S	M	M	S	M	S

S- Strong; M- Medium; L- Low

UNIT-I-INTRODUCTION**15 Hours**

Meaning and Nature of Investment - Objectives of Investment - Investment and Speculation - Investment and Gambling - Types of Investors - Process of Investment - Security Analysis - Meaning of Security - Types of Securities - Security Analysis- Meaning- Advantages.

UNIT-II SECURITYANALYSIS-I**20 Hours**

Risk - Meaning of Risk - Types of Risk - Fundamental Analysis - Meaning and Framework of Fundamental Analysis - Economic Analysis - Factors of Economic Analysis - Economic Forecasting - Forecasting Techniques – Role of Economic Analysis in Investment decisions.

UNIT –III SECURITYANALYSIS–II**20 Hours**

Industry Analysis - Concept of Industry - Sources of Information - Classification by Product - Business Cycle - Industry Life cycle - Company Analysis - Sources of Information (Internal and External) - Factors of Company Analysis - Operating Analysis - Management Analysis - Financial Analysis.

UNIT IVTECHNICALANALYSIS**20 Hours**

Technical Analysis- Meaning – Basic Principles and Assumptions of Technical Analysis - Difference between Fundamental Analysis and Technical Analysis - Efficient Market Theory - Tools of Technical Analysis - Charts - Types of Charts - Chart Patterns - Technical Indicators – Meaning – Usage of Technical Indicators.

UNIT-V PORTFOLIOMANAGEMENT**15 Hours**

Meaning - Objectives - Markowitz model(Both theory and problems)- Portfolio management Process - Portfolio Planning - Portfolio selection - Portfolio Evaluation- Portfolio Revision.

DISTRIBUTION OF MARKS: THEORY – 80% PROBLEM – 20%**TEXT BOOKS:**

S.NO	AUTHOR	TITLE OF THE BOOK	PUBLISHER	YEAR OF PUBLICATION
1.	S. Kevin	Security analysis and Portfolio Management	Eastern Economy Edition	2015
2.	Donald. E.Fischer& Ronald Jordon	Security analysis and Portfolio Management	Pearson	1995
3.	Prasanna Chandra	Investment Analysis and Portfolio Management	Tata McGraw Hill	2017

REFERENCE BOOKS:

S.NO	AUTHOR	TITLE OF THE BOOK	PUBLISHER	YEAR OF PUBLICATION
1	V.AAvadhani	Security analysis and Portfolio Management	Himalaya Publications	2010
2	V.K.Bhalla	Security analysis and Portfolio Management	S. Chand	2011
3	Dr. VanitaTripathi	Security analysis and Portfolio Management	Taxmann Publications Ltd	2000
4.	M.R. Agarwal	Security analysis and Investment Management	Garima publications	2015
5.	Ambika Prasad	Security Analysis and Portfolio Management	I.K International	2009
6.	Ranganathan. M &Madhumathi R	Security Analysis and Portfolio Management	Pearson	2012
7.	Falguni H.Pandya	Security Analysis and Portfolio Management	Jaico Publishing House	2013
8.	Pandian Punithavathy	Security Analysis and Portfolio Management	Vikas Publishing House Pvt Ltd	2013
9.	V.Gangadhar	Security Analysis and Portfolio Management	Anmol Publications Pvt Ltd	2006
10.	K. Sasidharan Alex K. Mathew	Security Analysis and Portfolio Management	McGraw hill Education	2011

TEACHING METHODOLOGY:

- Lecture given byTeacher
- Assignments.
- Discussions andInteractions.

SYLLABUS DESIGNERS:

- Dr. R. Padmaja, Associate Professor & Head, Department ofCommerce
- Ms.D. VijayaNirmala, Assistant Professor ofCommerce
- Mrs. J. Anbazhagi, Assistant Professor ofCommerce