As Per NEP 2020

Tolani College of Commerce (Autonomous)

Knowledge is Supreme

Title of the Course: Basics of Investment
Programme: B. Com (Financial Markets)
Semester I

Syllabus for 2 Credits

From the Academic Year: 2024-2025

Name of the Course: Basics of Investment

Sr. No.	Heading	Particulars
1	**Description of the Course :**	The Basics of Investment course introduces students to foundational principles and practices in investment management. Through comprehensive study, students learn to create investment portfolios tailored to their financial objectives and risk preferences. Topics include understanding investment vehicles, risk assessment, portfolio construction, and risk management strategies.
2	**Vertical :**	Major
3	**Type :**	Theory
4	**Credit**:	2 credits
5	**Hours Allotted :**	30 Hours
6	**Marks Allotted**:	50 Marks Continuous Evaluation : 20 Marks Semester End : 30 Marks
7	**Course Objectives**: The objective of this course is to: 1. equip learners with the knowledge and skills to create investment portfolios that match their financial goals and risk tolerance. 2. develop skills to recognize and manage various investment risks to improve returns and protect their investments.	
8	**Course Outcomes**: After successful completion of this course a learner will be in a position to: 1. learn how to build balanced investment portfolios that match their financial goals and risk tolerance. 2. identify and assess different types of investment risks and implement appropriate risk management strategies to protect and enhance investment returns.	

9	**Modules**:-

Module 1: Introduction to Basics of Investment   **(15 Hours)**

- Introduction to Investment- Definition of investment, Features of Investment, Importance of investment, Objectives of investing.
- Types of Investment Vehicles- Stocks: Characteristics, risk, and return, Bonds: Types, features, and risk-return trade-offs, Mutual Funds: Structure, types, and benefits, Real Estate: Investment considerations and risks.
- Risk and Return- Risk assessment in investments, Understanding the risk-return trade-off, Importance of diversification.
- Financial Planning and Investment Decisions- Goal setting in investment planning, Time value of money and compounding, Role of financial planning in investment decisions.

Module 2: Investment Strategies   **(15 Hours)**

- Setting Investment Goals- Identifying personal financial goals, Time horizon and risk tolerance.
- Building an Investment Portfolio- Basics of asset allocation, constructing a diversified portfolio.
- Managing Investment Risk- Techniques for managing investment risk, Importance of monitoring investments.
- Monitoring Investment Performance- Techniques for tracking and monitoring the performance of investments, assessing the effectiveness of investment strategies over time.

10	References :
	1. Bodie, Zvi, Alex Kane, and Alan J. Marcus. Essentials of Investments. McGraw Hill Education, 2019.
	2. Charles J. Corrado and Bradford D. Jorda, Fundamentals of Investments: Valuation and Management. McGraw Hill, 2000.
	3. Gitman, Lawrence J., and Michael D. Joehnk. Fundamentals of Investing. Pearson, 2018.
	4. Hemant S. Ahluwalia, Modern Investment Theory. Adhyayan publishers and distributors, 2008.
	5. Malkiel, Burton G. A Random Walk Down Wall Street: The Time-Tested Strategy for Successful Investing. W. W. Norton & Company, 2019.
	6. Bodie, Zvi, Alex Kane, and Alan J. Marcus. Investments. McGraw Hill Education, 2020.
	7. Fabozzi, Frank J., and Pamela Peterson Drake. Foundations of Financial Markets and Institutions. Pearson, 2017.

11	**Internal Continuous Assessment: 40%**	**Semester End Examination : 60%**

12	**Continuous Evaluation through:**

Sub-components	Maximum Marks	Conditions for passing
1) Assignment/Case Studies/Project/ Presentation/Book Review	10 Marks	a) A learner must be present for each of the sub-components.
2) MCQ Questions	10 Marks	
Total	**20 Marks**	

13 **Format of Question Paper:**

Question Paper Pattern for Semester End Examination (SEE)

Maximum Marks: 30   **Duration:1 Hour**

Question Number	Particular	Marks
Q-1	Attempt any ONE of the following:(Module 1) A. Full Length Question B. Full Length Question	10
Q-2	Attempt any ONE of the following: (Module 2) A. Full Length Question B. Full Length Question	10
Q-3	Short Notes attempt any TWO of the following: A. (Module 1) B. (Module 1) C. (Module 2) D. (Module 2)	10

Signatures of Team Members

Sr.No	Name	Signature
1.	Ms. Reshma Rajput	
2.	Ms. Neha Sawant	