

**PANIPAT INSTITUTE OF ENGINEERING AND TECHNOLOGY**  
**PANIPAT**  
**Department of Management Studies**

Semester: 4<sup>th</sup>

Faculty Name: Amit Singla

Course Title: Portfolio Management

Course No. FM-404

<b>Sr. No.</b>	<b>Lecture No.</b>	<b>Topics to be covered</b>	<b>Target Outcome</b>
1	L-1	Portfolio analysis – meaning, importance, objectives	CO1
2	L-2	Portfolio analysis – meaning, importance, objectives	CO1
3	L-3	defining investment objectives, investor preferences	CO1
4	L-4	various issues in portfolio construction and revision	CO3
5	L-5	portfolio analysis – diversification	CO3
6	L-6	portfolio risk and return	CO1
7	L-7	portfolio risk and return	CO1
8	L-8	Markowitz portfolio theory	CO2
9	L-9	Markowitz portfolio theory	CO2
10	L-10	portfolio selection	CO3
11	L-11	portfolio selection	CO3

<b>Sr. No.</b>	<b>Lecture No.</b>	<b>Topics to be covered</b>	<b>Target Outcome</b>
12	L-12	Single index model; introduction to asset pricing models	CO2
13	L-13	capital market theory, the capital asset pricing model (CAPM)	CO2
14	L-14	capital market theory, the capital asset pricing model (CAPM)	CO2
15	L-15	multifactor models of risk and return	CO2
16	L-16	arbitrage pricing theory (APT)	CO2
17	L-17	multifactor models and risk estimation	CO2
18	L-18	valuation principles and practices	CO2
19	L-19	value of financial statement analysis	CO2
20	L-20	Theory of valuation, security valuation process, valuation of alternative investments, relative valuation techniques.	CO2
21	L-21	Theory of valuation, security valuation process, valuation of alternative investments, relative valuation techniques.	CO2
22	L-22	Theory of valuation, security valuation process, valuation of alternative investments, relative valuation techniques.	CO2
23	L-23	Theory of valuation, security valuation process, valuation of alternative investments, relative valuation techniques.	CO2
24	L-24	Portfolio performance evaluation and management - SEBI guidelines on portfolio management	CO4
25	L-25	asset management – managed portfolios, professional money management companies	CO4

<b>Sr. No.</b>	<b>Lecture No.</b>	<b>Topics to be covered</b>	<b>Target Outcome</b>
26	L-26	investing in alternative asset classes	CO4
27	L-27	portfolio performance evaluation, performance measurement techniques, risk adjusted measures of performance evaluation	CO4
28	L-28	evaluation criteria and procedures	CO4
29	L-29	Evaluation of bond portfolio performance, reporting investment portfolio performance.	CO4
30	L-30	Wealth Management- Wealth cycle, Risk profiling and assets allocations	CO5
31	L-31	Estate planning and taxation of Investment	CO5
32	L-32	Client data collections and analysis	CO3

<b>FM-404: Portfolio Management</b>	
<b>CO 1</b>	Discuss the theoretical and practical role of portfolio management also recognize and apply appropriate theories, principles, and concepts relevant to portfolio management.
<b>CO 2</b>	Demonstrate the ability to develop interpersonal skills relevant to security valuation and portfolio management and apply basic concepts and tools to the Problems faced by a manager in investment decisions.
<b>CO 3</b>	Examine knowledge on different aspect and stages of portfolio construction process also formulate and exercise appropriate judgment in selecting and presenting information using various methods relevant to portfolio management.
<b>CO 4</b>	Apply various tools and methods of evaluating the portfolio.
<b>CO 5</b>	Explore the various techniques of portfolio appraisal & revision.