

Curriculum plan (Even Semester 2025-2026)

Teacher Name: Sonia Kamboj

Paper name: Fundamentals of Investment

Class type: B.Com Sem VI-B

Paper shared with: N/A

Unit to be taken	Month wise schedule to be followed	Tests/Assignments/ Revision/Presentations etc
<p>Unit1: Introduction to Investment:</p> <p>Concept of Investment; Investment Decision Process; Avenues for investment- features and classes; Difference between investment, speculation, and gambling; Primary market and Secondary Markets- Trading of securities; Security market indices; Return and risk: concept, calculation; trade-off between risk and return; Impact of taxes and inflation on investments.</p> <p>Unit 2: Bond Analysis and Valuation:</p> <p>Bond Fundamentals, Estimating bond yields; Bond Valuation;</p>	January, 2026	Classroom discussions
<p>Unit 2: Bond Analysis and Valuation:</p> <p>Relationship between bonds prices, interest rates and term to maturity; bond risks and credit rating.</p> <p>Unit3: Equity Analysis and Valuation:</p> <p>Fundamental Analysis</p>	February, 2026	Quiz from Unit I and II, Classroom discussions, Project work
<p>Unit3: Equity Analysis and Valuation:</p> <p>Technical Analysis and Efficient Market Hypothesis; Valuation of Equity Shares using Dividend Discount Model and P/E Ratio model.</p> <p>Unit IV: Portfolio Management :</p>	March, 2026	Test from Unit I, II & III, Classroom discussions, Field Work

Portfolio Management- Concept and need, Measurement of Portfolio Return and risk		
Unit IV: Portfolio Management : Diversification- Markowitz Theory; Capital Asset Pricing Model. Unit V: Mutual Fund and Derivatives : Mutual Fund-concept and types; Overview of Financial Derivatives-Forwards; Futures and Options.	April, 2026	Classroom discussions, Group Presentations, Viva-voce

Reference

1. Bodie, Z., Kane, A., Marcus A.J. ,& Mohanty, P.(2020).Investments. New York, United States: McGraw Hill.
2. Chandra, P.(2021).Investment Analysis & Portfolio Management. Delhi, India: Tata McGraw Hill Education
3. Jones, C.P. (2019). Investment Analysis and Management. New Jersey, United States: Wiley.
4. Kevin, S.(2015).Security Analysis and Portfolio Management. Delhi, India: PHI Learning
5. Rustagi, R.P.(2023). Investment Management. Delhi, India: Sultan Chand.
6. Tripathi,V. (2019). Fundamentals of Investment. Delhi, India: Taxmann Publications