



Chhatrapati Shahu Ji Maharaj University, Kanpur

# VOCATIONAL COURSE

**Drafted by-**

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# **INVESTMENT MANAGEMENT**

## **Course Objectives:**

Investment management not only signifies buying and selling of financial assets but it also aims at handling of financial assets and other investments alternatives. This course provides a broad overview of investment management, by focusing on the application of finance theory to the issue faced by portfolio managers and investors in general and to provide conceptual foundation for the purpose of undertaking investment analysis for securities as well as portfolios.



## **Course Content/ Syllabus**

### **SEMESTER I**

#### **Overview & Outline of Investment:**

Meaning & Types of Investments, Objectives of Investment, Process of Investment, Emerging Dimensions in Online Investments Portals.

**\*A visit to SEBI (Securities and Exchange Board of India)**

### **SEMESTER II**

#### **Mutual Funds Overview:**

Meaning & Types of Mutual Funds, Asset Management Company (AMC), Trustees, Sponsor Company. Classification of Mutual Funds, Schemes as per SEBI Guidelines.

**\*One week Training – On campus/Off Campus.**

## **SEMESTER III**

### **Financial Instruments:**

SIP (Systematic Investment Plan), Systematic Withdrawal Plan (SWP), Loan & SIP Management, Financial Instruments- IPO, NPO; Investment Opportunities.

**\*Practical Training on SIP Calculator.**

## **SEMESTER IV**

### **Insurance as an Investment Tools:**

Meaning of Insurance, Evolution & Growth of ULIP (Unit Linked Insurance Plan), Insurance and Retirement Planning.

**\*Online workshop- Lecture by Financial Experts.**