

MASTER OF BUSINESS ADMINISTRATION

Lesson Plan & Work-done Diary for AY:2026-27 ODD Semester

Course with Code: Investment Analysis & Portfolio Management (MBA FM314)				Faculty: Ms. Kavana J		Semester & Section: III Sem		
Class No.	Date planned (DD/MM)	Topics to be covered	TLP Planned	Class No.	Date of Conduction (DD/MM)	Topics Covered	TLP Executed	Remarks if any deviation
MODULE-1								
1	15-09-2026	Bridge Course on Finance	Chalk & Talk					
2	16-09-2026	Bridge Course on Finance	Chalk & Talk					
3	17-09-2026	Introduction to Investment: Investment Avenues, Attributes	PPT					
4	21-09-2026	Features of a good Investment, Investment Process, Investor V/s speculator	PPT					
5	22-09-2026	Financial Instruments: Money Market Instruments, Capital Market Instruments, Derivatives.	PPT					
6	23-09-2026	Securities Market: Trading & Settlement Procedure.	PPT					
7	24-09-2026	Stock Market Indicators- Indices of Indian Stock Exchanges.	PPT					
8	28-09-2026	Mutual Funds: Concept of Mutual Funds, Participants in Mutual Funds	PPT					
9	29-09-2026	Advantages and Investment in Mutual Fund	PPT					
10	30-09-2026	Types of Mutual funds.	PPT					

MASTER OF BUSINESS ADMINISTRATION

MODULE-2								
11	01-10-2026	Concept of Risk, Causes of Risk, Types of Risk- Systematic risk- Market Price Risk, Interest Rate Risk, Purchasing Power Risk	PPT					
12	05-10-2026	Unsystematic Risk- Business risk, Financial Risk, Insolvency Risk, Risk-Return Relationship	PPT					
13	06-10-2026	Concept of diversifiable risk and non- diversifiable risk.	PPT					
14	07-10-2026	Calculation of Return & Risk of Individual Security & Portfolio	Chalk & Talk					
15	08-10-2026	Calculation of Return & Risk of Individual Security & Portfolio	Chalk & Talk					
16	12-10-2026	Calculation of Return & Risk of Individual Security & Portfolio	Chalk & Talk					
17	13-10-2026	Calculation of Return & Risk of Individual Security & Portfolio	Chalk & Talk					
18	14-10-2026	Calculation of Return & Risk of Individual Security & Portfolio	Chalk & Talk					
19	15-10-2026	Case Study on Risk & Return Concepts	Chalk & Talk					

MASTER OF BUSINESS ADMINISTRATION

MODULE-3

MODULE-3								
20	19-10-2026	Bond – Meaning, features, types, determinants of interest rates	PPT					
21	21-10-2026	Bond Valuation	Chalk & Talk					
22	22-10-2026	Bond Valuation, Bond Duration,	Chalk & Talk					
23	27-10-2026	Bond Management Strategies.	PPT, Chalk & Talk					
24	28-10-2026	Preference Shares- Concept, Valuation.	PPT, Chalk & Talk					
25	29-10-2026	Preference Shares- Valuation.	Chalk & Talk					
26	02-11-2026	Equity Shares-Concept, Valuation	PPT, Chalk & Talk					
27	03-11-2026	Dividend Valuation Models, P/E Ratio valuation model.	Chalk & Talk					
28	04-11-2026	Dividend Valuation Models, P/E Ratio valuation model.	Chalk & Talk					
29	05-11-2026	Case Study on Valuation	Chalk & Talk					

MASTER OF BUSINESS ADMINISTRATION

MODULE-4								
30	09-11-2026	Macro-Economic and Industry Analysis: Fundamental analysis-EIC Frame Work, Economy Analysis	PPT					
31	11-11-2026	Industry Analysis, Company Analysis- Financial Statement Analysis.	PPT					
32	17-11-2026	Market Efficiency: Efficient Market Hypothesis, Forms of Market Efficiency, Empirical test for different forms of market efficiency.	PPT					
33	18-11-2026	Technical Analysis – Concept, Theories- Dow Theory, Eliot Wave theory.	PPT					
34	19-11-2026	Charts-Types, Trends and Trend Reversal Patterns	PPT					
35	23-11-2026	Mathematical Indicators –Moving Average Convergence-Divergence, Relative Strength Index	PPT					

MASTER OF BUSINESS ADMINISTRATION

MODULE-5								
36	24-11-2026	Problems on Markowitz Model-Diversification, Portfolio Return, Portfolio Risk, Efficient Frontier	PPT, Chalk & Talk					
37	25-11-2026	Problems on Markowitz Model	Chalk & Talk					
38	26-11-2026	Problems on Sharpe's Single Index Model	Chalk & Talk					
39	30-11-2026	Problems on Sharpe's Single Index Model	Chalk & Talk					
40	01-12-2026	Problems on Capital Asset Pricing Model: Assumptions, CAPM Equation	PPT, Chalk & Talk					
41	02-12-2026	Problems on Capital Asset Pricing Model: Assumptions, CAPM Equation	Chalk & Talk					
42	03-12-2026	Capital Market Line, Security Market Line, CML V/s SML	Chalk & Talk					
43	07-12-2026	Sharpe's Optimum Portfolio Construction	PPT, Chalk & Talk					
44	08-12-2026	Problems on Sharpe's Optimum Portfolio Construction	Chalk & Talk					
45	09-12-2026	Optimum Portfolio with Short sales	Chalk & Talk					

MASTER OF BUSINESS ADMINISTRATION

MODULE-6								
46	10-12-2026	Portfolio Management Strategies: Active Portfolio Management strategy.	PPT,Chalk & Talk					
47	14-12-2026	Passive Portfolio Management strategy.	Chalk & Talk					
48	15-12-2026	Portfolio Revision: Portfolio Revision Strategies	Chalk & Talk					
49	16-12-2026	Objectives, Performance plans.	Chalk & Talk					
50	17-12-2026	Measure of Mutual Fund Performance. Portfolio performance Evaluation: Sharpe's Performance Index	Chalk & Talk					
51	21-12-2026	Treynor's Performance Index	Chalk & Talk					
52	22-12-2026	Jensen's Performance Index	Chalk & Talk					
53	23-12-2026	Revision	Chalk & Talk					
54	24-12-2026	Revision	Chalk & Talk					



MASTER OF BUSINESS ADMINISTRATION

	Activity	Planned	Actual	Remarks
1	Theory Classes	54		
2	Assignments/ Quizzes/ Self-study	3		
3	Tutorials/ Extra classes	-		
4	Internal Assessments	2		
5	ICT based Teaching (% of usage in Curriculum)	40%		
Planning			Execution	
Faculty Signature:			Faculty Signature:	
HOD Signature:			HOD Signature:	