



J.C. BOSE UNIVERSITY OF SCIENCE AND TECHNOLOGY, YMCA, FARIDABAD, HARYANA, (INDIA)

A State Government University (Accredited 'A+' Grade by NAAC)

(Established by Haryana State Legislative Act No. 21 of 2009, Recognized by U.G.C. u/s 2 (f) and 12(B) of U.G.C. Act 1956)
SECTOR-6, MATHURA ROAD, FARIDABAD-121006, HARYANA, (INDIA)

Community College of Skill Development

Lesson Plan: Security Analysis and Portfolio Management (BFSI-514)

Program: B.Voc BFSI Semester: 5th Course Code: BFSI-514 Credits: 3

Course Objectives:

The objective of this course is to equip students with understanding of the concepts of investment, securities markets, security operations, security analysis and approaches of portfolio development, portfolio evaluation & portfolio revision.

Course Outcomes:

After the successful completion of the course, students will be able to:

CO1. Understand different aspects of risks which are faced by individuals and organizations while investing.

CO2. Analyze securities on basis of risk and return analysis.

CO3. Apply contemporary approaches of portfolio for developing and optimising the portfolio.

CO4. Evaluate and revise the portfolio in the light of changing market dynamics.

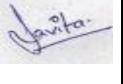
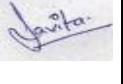
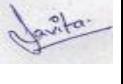
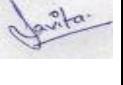
Equipment required in Classroom/ Laboratory/ Workshop

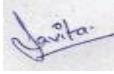
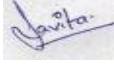
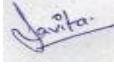
- i. LCD/Projector
- ii. Whiteboard/ Black Marker

Assessment Scheme

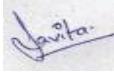
S.No.	Criteria	Marks
1	End Term Examination	75
2	Internal Evaluation Scheme	25
2a	Class Tests	15
2a (i)	Class Test-I	7.5
2a (ii)	Class Test-II	7.5
2(b)	Teacher Assessment (Continuous Evaluation)	10

2b (i)	Attendance	5
2b (ii)	Assignment / Presentation	5

Lecture No.	Topic Covered	Pedagogy	Date of Implementation	Course Outcomes Covered	Faculty Sign
1	Meaning, Nature and Scope of Investment	Discussion and PPT	28/7/2025	CO1	
2	Objectives and Process of Investment Decision	Discussion and PPT	30/7/2025	CO1	
3	Investment Alternatives: Real and Financial Assets	Student Assignment in class	04/08/2025	CO1	
4	Measurement of Risk and Return – Basic Concepts	White Board Lecture	05/08/2025	CO1	
5	Types of Risk: Interest Rate Risk, Market Risk, Inflation Risk, Default Risk	White Board Lecture	06/08/2025	CO1	
6	Measurement of Systematic and Unsystematic Risk	White Board Lecture	07/08/2025	CO1	
7	Return: Historical Return vs. Expected Return, Holding Period Return and Notion of Dominance	Discussion/ White Board Lecture	12/08/2025	CO1	
8	Valuation of Shares (Variable Income Securities)	White Board Lecture	13/08/2025 and 14/08/2025	CO1	

9	Valuation of Shares (Variable Income Securities) continued	White Board Lecture and Discussion	18/08/2025	CO1	
10	Valuation of Bonds (Fixed Income Securities)	White Board Lecture and Discussion	19/08/2025	CO1	
11	Introduction to Security Analysis and Its Objectives, Introduction to fundamental and technical analysis	PPT and White Board Lecture	20/08/2025	CO2	
12	Efficient Market Hypothesis (EMH): Concept and Random Walk Theory	PPT/ White Board Lecture	21/08/2025 and 25/08/2025	CO2	
13	Tests and Results of Efficient Market Hypothesis	White Board Lecture	26/08/2025	CO2	
14	Fundamental Analysis – Economic Analysis, Industry Analysis and Company Analysis	PPT and White Board Lecture	28/08/2025 and 01/09/2025	CO2	
15	Technical Analysis – Concept, objectives and Importance	Discussion with PPT	03/09/2025	CO2	
16	Dow Theory, Support and Resistance Levels	White Board Lecture	04/09/2025	CO2	
17	Technical Tools: Moving Averages and Breadth of Market, Chart Patterns	PPT/ White Board Lecture	08/09/2025	CO2	
18	Chart Patterns continued	PPT/ White Board Lecture	09/09/2025	CO2	
19	Comparison of fundamental and technical analysis	PPT and Discussion	10/09/2025	CO2	
20	Revision and doubt taking	Discussion	10/09/2025	CO2	

21	Portfolio Meaning, Objectives and Advantages	PPT/Discussion	15/09/2025	CO3	
22	Portfolio Selection and Approaches to Portfolio Construction	White Board Lecture	16/09/2025	CO3	
23	Concept of Diversification and Its Role in Risk Reduction	Discussion	18/09/2025	CO3	
24	Markowitz Portfolio Theory – Risk and Return Analysis	White Board Lecture	19/09/2025	CO3	
25	Markowitz Efficient Frontier and Optimum Portfolio	White Board Lecture	06/10/2025	CO3	
26	Sharpe's Single Index Model – Concept and Application	Discussion/ White Board Lecture	08/10/2025	CO3	
27	Corner Portfolio and Sharpe's Optimal Portfolio and Construction of Optimal Portfolio Using Sharpe's Model	White Board Lecture	09/10/2025	CO3	
28	Capital Asset Pricing Model (CAPM) – Concept and Assumptions	White Board Lecture	15/10/2025	CO3	
29	Pricing of Securities, Risk-Free Assets, and CML vs. SML	White Board Lecture	27/10/2025	CO3	
30	Revision and doubt taking	Discussion	28/10/2025	CO3	
31	Portfolio Evaluation – Meaning and Importance	PPT	29/10/2025	CO4	
32	Portfolio Evaluation Strategies and Performance Measures	PPT	29/10/2025	CO4	
33	Sharpe Ratio, Treynor Ratio, and Jensen's Alpha – Concept and Calculation	White Board Lecture	3/11/2025	CO4	

34	Need and Purpose of Portfolio Revision	White Board Lecture	3/11/2025	CO4	
35	Techniques of Portfolio Revision – Formula Plans	White Board Lecture	4/11/2025	CO4	
36	Techniques of Portfolio Revision – Constant Ratio and Variable Ratio Plans	White Board Lecture	10/11/2025	CO4	
37	Portfolio Revision under Changing Market Conditions	White Board Lecture	11/11/2025	CO4	
38	Active vs. Passive Portfolio Management Strategies	White Board Lecture	12/11/2025	CO4	
39	Revision and doubt taking	White Board Lecture	12/11/2025	CO4	
40	Revision and doubt taking	Discussion	15/11/2025	CO4	

Text Books:

1. Punitavathy Pandian, Security Analysis and Portfolio Management, Vikas Publishing House Pvt. Ltd.

Reference Books:

1. "Security Analysis and Portfolio Management" by Donald E. Fischer and Ronald J. Jordan, Pearson Education.
2. "Investment Analysis and Portfolio Management" by Prasanna Chandra, McGraw Hill Education.