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Total No. of Questions : 5]

SEAT No. :

PF-5743

[Total No. of Pages : 2

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S.Y. M.B.A.
FIN 612 MJ : Security Analysis & Portfolio Management
(2024 Pattern) (Semester - III)

Time : 2½ Hours] *[Max. Marks : 50*

Instructions to the candidates :

1) *All questions are compulsory.*
2) *Assume necessary data give example.*
3) *Each question carries 10 marks.*
4) *Q.3, Q.4, Q.5 question has an Internal Options.*

Q1) Solve any five out of 8 questions : **[5 × 2 = 10]**

a) List five markelable financial assets.

b) Define Risk & Return.

c) Equity Valuation includes.

i) NAV Method

ii) Dividend discount Model

iii) Random Walk

iv) None of the above

d) What are the three types of analysis used in fundamental Analysis.

e) List the different 5 types of Bonds

f) Define Portfolio Revision

g) Write key Assumption of Capital Assets Pricing Model [CAPM]

h) What Investment means & state its objectives

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Q2) Write short notes any two : **[2 × 5 = 10]**

a) Distinguish between Investment & speculation in today's scenario.

b) Relate the relationship between Risk & Return in short term & long term portfolio.

c) Compare the systematic risk & unsystematic risk with suitable example.

Q3) Attempt any one :

a) Relate the importance of fundamental Analysis in making Investment Portfolio. **[10]**

b) An Investor can not consistently earn excess returns by undertaking fundamentals or technical analysis. Justify your answer. **[10]**

Q4) Attempt any one :

a) Analyse how technical analysis differs from fundamental analysis with suitable tools and examples. **[10]**

b) Examine the weak, semi strong and strong forms of market efficiency. Which form is most applicable to Indian stock markets? **[10]**

Q5) Answer any one : **[10]**

a) As an investment advisor, you are consulted by a retired govt. employee who has received a lumpsum settlement Rs. 35 lakhs. He seeks your guidance regarding safe and moderate risk investment options that can provide steady income, tax efficiency and capital protection. Recommend a suitable investment portfolio with justification. **[10]**

b) Prepared a detailed investment recommendation report based on your macro economic outlook, sector evaluation and fundamental analysis of a chosen listed company your report should highlight risk - return expectations, competitive positioning, corporate governance strength and long term investment potential.