Bharati College

**(University of Delhi)**

Janak Puri, Delhi- 100058

[www.bharaticollege.du.ac.](http://www.bharaticollege.du.ac.)in

Lesson Plan (SEC, Semester IV, January to May 2023)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Name of Teacher** | Prof. Rajni | | **Department** | | \_Commerce\_\_\_\_\_ |
| **Course** | B.Com | | **Semester** | | IV |
| **Paper** | Investing in Stock Market | | **Academic Year** | | 2022-23 |
| **Learning Objectives** | | | | | |
| To equip students with the basic skills required to operate in stock market. | | | | | |
| **Learning Outcomes** | | | | | |
| After completing the course, the student shall be able to:  CO1 - understand the basics of Investing, the Investment Environment as well as Risk & Return.  CO2 – learn Indian securities market including the Derivatives Market.  CO3 - learn EIC framework and conduct Fundamental Analysis.  CO4 - understand fundamental andTechnical Analysis.  CO5 - understand the Mutual funds market and learn to Invest in Mutual Funds. | | | | | |
| **Lesson Plan** | | | | | |
| **Week No.** | | **Theme/Curriculum** | | **Any Additional Information** | |
| Week 1  Week 2 | | Unit 1   * Basics of Investment & Investment Environment. Risk and Return, Instruments of Investment - Equity shares, Preference shares, Bonds and Debentures. * Trading in securities: Types of orders, using brokerage and Analyst recommendations. | | \*Live Trading Session for the students to have an understanding of stock market | |
| Week 3  Week 4  Week 5 | | Unit-2   * An overview of Indian Securities Market: Primary Market (IPO, FPO, Private placement, Offer for sale), * Secondary Market (cash market and derivative market: Futures and Options) Market Participants: Stock Broker, Investor, Depositories, Clearing House, Stock Exchanges. * Role of stock exchange, Stock exchanges in India: BSE, NSE, MSEI. Security Market Indices: Nifty & Sensex, Sources of financial information. | | \*Special lecture and sessions on understanding of Indian Stock Market, BSE, NSE, trading system in stock exchanges. | |
| Week 6  Week 7  Week 8 | | Unit-3   * Top down and bottom up approaches, Analysis of international & domestic economic scenario, Industry analysis, * Company analysis (Quality of management, financial analysis :Both Annual and Quarterly, Income statement analysis, position statement analysis including key financial ratios, Cash flow statement analysis, * Industry market ratios: PE, PEG, Price over sales, Price over book value, EVA), Understanding Shareholding pattern of the company. | | \*Assignment from Unit 1 and Unit 2 | |
| Week 9-10 | | Unit-4   * Trading rules (credit balance theory, confidence index, filter rules, market breath, advances vs declines and charting (use of historic prices, simple moving average and MACD) basic and advanced interactive charts. Do’s & Don’ts of investing in markets. | | \*Assignment related to trading on virtual trading platform by Investing an amount of Rs 1 lakh and earn return. | |
| Week 11  Week 12 | | Unit-5   * Concept and background on Mutual Funds: Advantages, Disadvantages of investing in Mutual Funds, Types of Mutual funds: Open ended, close ended, equity, debt, hybrid, money market, and entry load vs. exit load funds. * Factors affecting choice of mutual funds. CRISIL mutual fund ranking and its usage, calculation and use of Net Asset Value. | | \*Class test from Unit 3 | |
| **References** References  * Kumar, V and Nangia, R.S*. Investing in Stock Markets,* Ane books. * Singh J K & Singh Amit Kumar*, Investing in stock Markets,* A K Publications*, Delhi.* * Tripathi Vanita & Panwar N *, Investing in Stock Markets,* Taxmann’s Publication.   **Additional Resources**   * 1. Chandra, Prasanna. *Investment Analysis and Portfolio Management*, Tata McGraw Hil.l * Damodaran, Aswath. *Investment Validation Tools and Technique for Determining Mutual Funds*, John Wiley & Sons. * Gurman and Jochnk, *Fundamentals of Investing*, Pearworth.   Madura, Jeff, *Personal Finance*, Pearson. | | | | | |
| **Online Resources (If Any)** | |  | | | |
| **Assignment and Class Test Schedule for Semester** | | Link the assignment and Test (optional) | | | |