

Semester V Lecture Plan

Name of the college: Government College of Arts Science & Commerce, Sanquelim						
Name of Faculty: Ms. Ishwari Kamat			Subject: Portfolio Management			
Paper code: VOG 502			Program/Course: T.Y.B.VOC		Division:	
Academic year: 2025-26			Semester: V		Total Lectures: 45	
Course Objectives: 1. To enable learners to understand traditional and modern portfolio theories, and apply the concepts of portfolio risk and return. 2. To enable learners to apply the concept of portfolio selection models. 3. To enable learners to apply the concepts of portfolio performance evaluation and revision.						
Expected Course Outcome: 1. Discuss the traditional and modern portfolio theories and apply concepts of portfolio risk and return. 2. Apply the concept of portfolio selection models in investment decisions. 3. Apply the concepts of portfolio performance evaluation and revision in investment decisions.						
Student learning outcome 1. Students will be able to manage their own portfolio in an effective manner and manage their finances well.						
Month	Lectures From: To:	No. of lectures allotted	Topic, Subtopic to be covered	Exercise and assignments	ICT Tools	Reference books
June	20 June - 28 June 2025	2	Introduction to the subject & Syllabus	Introduction	PPT presentation & Smart board	Fischer & Jordan (Latest Edition). Security Analysis and Portfolio Management. Delhi:

			Unit 1: Introduction to portfolio management			Prentice Hall India., Punithavathy P. (Latest Edition). Security Analysis and Portfolio Management. Mumbai: Vikas Publishing House Pvt. Ltd.
July	30 June - 5 July 2025	3	Unit 1: Introduction to Management Introduction, meaning, objectives of Portfolio Management	Group Discussion, Relevant Examples	YouTube, Diagrams, PPT presentation & Smart board	Fischer & Jordan (Latest Edition). Security Analysis and Portfolio Management. Delhi: Prentice Hall India., Punithavathy P. (Latest Edition). Security Analysis and Portfolio Management. Mumbai: Vikas Publishing House Pvt. Ltd.
July	7 July - 12 July 2025	3	Portfolio Management Process	Group Discussion, Relevant Examples	PPT, Audio Visual, Smart Board	Fischer & Jordan (Latest Edition). Security Analysis and Portfolio Management. Delhi: Prentice Hall India., Punithavathy P. (Latest Edition). Security Analysis and Portfolio Management. Mumbai: Vikas Publishing House Pvt. Ltd.

July	14 July - 19 July 2025	3	portfolio theories: traditional and modern;	Group Discussion, Relevant Examples	PPT, Audio Visual, Smart Board	Fischer & Jordan (Latest Edition). Security Analysis and Portfolio Management. Delhi: Prentice Hall India., Punithavathy P. (Latest Edition). Security Analysis and Portfolio Management. Mumbai: Vikas Publishing House Pvt. Ltd.
July	21 July - 26 July 2025	3	Computation of Portfolio risk and portfolio returns. (Includes practical problems)	Assignment on Portfolio management, Problems solutions	PPT, Audio Visual, Smart Board	Fischer & Jordan (Latest Edition). Security Analysis and Portfolio Management. Delhi: Prentice Hall India., Punithavathy P. (Latest Edition). Security Analysis and Portfolio Management. Mumbai: Vikas Publishing House Pvt. Ltd.
July–Aug	28 July - 2 August 2025	3	Unit 2 : Portfolio Selection Models Markowitz's Modern Portfolio Theory Assumptions Diversification	Group Discussion, Interactive session	PPT, Audio Visual, Smart Board	Fischer & Jordan (Latest Edition). Security Analysis and Portfolio Management. Delhi: Prentice Hall India., Punithavathy P. (Latest Edition). Security Analysis

						and Portfolio Management. Mumbai: Vikas Publishing House Pvt. Ltd.
August	4 August - 9 August 2025	3	Sharpe Single Index Model Capital Asset Pricing Model (CAPM)	Group Discussion, Interactive session & Practical Numerical	PPT, Audio Visual, Smart Board	Fischer & Jordan (Latest Edition). Security Analysis and Portfolio Management. Delhi: Prentice Hall India., Punithavathy P. (Latest Edition). Security Analysis and Portfolio Management. Mumbai: Vikas Publishing House Pvt. Ltd.
August	11 August - 16 August 2025	3	Arbitrage Pricing Theory, Practical Numerical	Group Discussion, Interactive session & Practical Numerical	PPT, Audio Visual, Smart Board	Fischer & Jordan (Latest Edition). Security Analysis and Portfolio Management. Delhi: Prentice Hall India., Punithavathy P. (Latest Edition). Security Analysis and Portfolio Management. Mumbai: Vikas Publishing House Pvt. Ltd.
August	18 August - 23 August 2025	3	Practical Numerical	Solution of problems	PPT, Audio Visual, Smart Board	Fischer & Jordan (Latest Edition). Security Analysis and Portfolio

						Management. Delhi: Prentice Hall India., Punithavathy P. (Latest Edition). Security Analysis and Portfolio Management. Mumbai: Vikas Publishing House Pvt. Ltd.
—	26 August - 1 Sep 2025	0 (Holiday week)		—	—	
September	2 September - 6 September 2025	3	Practical Numerical	Solution of problems	PPT, Audio Visual, Smart Board	Fischer & Jordan (Latest Edition). Security Analysis and Portfolio Management. Delhi: Prentice Hall India., Punithavathy P. (Latest Edition). Security Analysis and Portfolio Management. Mumbai: Vikas Publishing House Pvt. Ltd.
September	8 September - 13 September 2025	3	Unit 3: Portfolio Performance Evaluation and Revision Portfolio Performance Evaluation: Need, Meaning, Risk Adjusted Returns.	Group Discussion, Guest Lectures on Portfolio Management	PPT, Audio Visual, Smart Board	Fischer & Jordan (Latest Edition). Security Analysis and Portfolio Management. Delhi: Prentice Hall India., Punithavathy P. (Latest Edition). Security Analysis and Portfolio

						Management. Mumbai: Vikas Publishing House Pvt. Ltd.
September	15 September - 20 September 2025	3	Performance Evaluation Ratios: Sharpe's Ratio, Treynor's Ratio, Jensen Ratio.	Group Discussion, Interactive session	PPT, Audio Visual, Smart Board	Fischer & Jordan (Latest Edition). Security Analysis and Portfolio Management. Delhi: Prentice Hall India., Punithavathy P. (Latest Edition). Security Analysis and Portfolio Management. Mumbai: Vikas Publishing House Pvt. Ltd.
September	22 September - 27 September 2025	3	Portfolio Revision: Need for Revision, Meaning, Constraints,	Group Discussion, YouTube case videos	PPT, Audio Visual, Smart Board	Fischer & Jordan (Latest Edition). Security Analysis and Portfolio Management. Delhi: Prentice Hall India., Punithavathy P. (Latest Edition). Security Analysis and Portfolio Management. Mumbai: Vikas Publishing House Pvt. Ltd.
October	29 September - 4 October 2025	3	Portfolio Revision strategies: Formula Plans, Constant Rupee Value Plan, Constant Ratio Plan,	Group Discussion, YouTube case videos	PPT, Audio Visual, Smart Board	Fischer & Jordan (Latest Edition). Security Analysis and Portfolio Management. Delhi:

			Dollar Cost Averaging (Including Problems)			Prentice Hall India., Punithavathy P. (Latest Edition). Security Analysis and Portfolio Management. Mumbai: Vikas Publishing House Pvt. Ltd.
October	6 October - 11 October 2025	3	Revision	Quiz, Assignments, Mock viva	Google Forms, LMS	All references
October	11 October – 18 October 2025	3	Revision			

Assessment Rubrics

Component	Max Marks
ISA 1	10
ISA 2	10
Practical	Nil
Project	Nil
Semester End Exam	60

Ms. Ishwari Kamat
Assistant Professor in Commerce