



Department of Management Studies

Curriculum & Syllabus
BBA -Financial Planning (FP)
2018-19 Regulation

I SEMESTER					
Subject Code	Subject Title	L	T	P	C
HBTA17001	Language - I /Tamil I/Hindi I/French I	3	0	0	3
HBEN17001	Language - II / Business English - I	3	0	0	3
HBBA18F01	Basic of Financial Accounting	3	1	0	4
HBBA18F02	Principles of Management	3	1	0	4
	Allied:-				
HBBA18FA1	Managerial Economics	4	0	0	4
					Credit Sub Total: 18

II SEMESTER					
Subject Code	Subject Title	L	T	P	C
HBTA17002	Language - II / Tamil II/Hindi II/French II	3	0	0	3
HBEN17002	Language - II / Business English - II	3	0	0	3
HBBA18F03	Principles & Ethics of Financial Planning	3	1	0	4
HBBA18F04	Risk Management and Insurance Planning	3	1	0	4
	Allied:-				
HBBA18FA2	Applied Personal Finance	3	1	0	4
					Credit Sub Total: 18

Total Credit:36



Department of Management Studies

III SEMESTER					
Subject Code	Subject Title	L	T	P	C
HBBA18F05	Retirement Planning & Employee Benefits	4	0	0	4
HBBA18F06	Valuations	4	0	0	4
HBBA18F07	Fixed Income Securities	4	0	0	4
HBMA18F01	Financial Statistics	3	1	0	4
HBBA18F08	Principles of Marketing	3	0	0	3
HBBA18FL1	Spreadsheets for Finance	0	0	2	2
Credit Sub Total: 21					

IV SEMESTER					
Subject Code	Subject Title	L	T	P	C
HBBA18F09	Investment Analysis	3	1	0	4
HBBA18F10	Derivatives	3	1	0	4
HBBA18F11	Portfolio Management	4	0	0	4
HBBA18F12	Personal Income Tax	4	0	0	4
HBBA18F13	Marketing of Financial Services	4	0	0	4
HBBA18FL2	Interview Techniques	0	0	2	2
Credit Sub Total: 22					

Total Credit:43



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V SEMESTER					
Subject Code	Subject Title	L	T	P	C
HBBA18F14	Estate Planning	4	0	0	4
HBBA18F15	Wealth Management	3	1	0	4
HBBA18F16	Business Strategy	4	0	0	4
HBBA18F17	Share Market Operations	4	0	0	4
HBBA18F18	Sales Management	3	0	0	3
HBBA18F19	Financial Management	3	1	0	4
					Credit Sub Total: 23

VI SEMESTER					
Subject Code	Subject Title	L	T	P	C
HBBA18F20	Financial Plan Construction	3	1	0	4
HBBA18F21	Legal and Regulatory Aspects of Business	4	0	0	4
HBBA18F22	Customer Relationship Management	3	0	0	3
HBBA18F23	Business Environment	3	0	0	3
HBMG17G01	Entrepreneurship Development	4	0	0	4
HBBA18FP1	Project & Viva-Voce	0	0	10	10
					Credit Sub Total: 28

Total Credit:51

Credit Summary

1st Semester - 18

2nd Semester - 18

3rd Semester - 21

4th Semester - 22

5th Semester - 23

6th Semester - 28

Overall Total Credit -130



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HBTA17001	TAMIL – I	L	T	P	C
		3	0	0	3

நோக்கம்:

- வாய்மொழி இலக்கியத்தையும் செய்யுள் இலக்கியத்தையும் அறிந்துகொள்ளல்.
- சிறுகதை மரபினைப் புரிந்துகொள்ளல்.
- பிழையின்றித் தமிழ் எழுதுவதற்கு அடிப்படை இலக்கணத்தைப் பயிற்றுவித்தல்.
- கவிதை மரபினையும் சிறுகதை மரபினையும் வரலாற்று நிலையிலிருந்து விளக்குதல்.

அலகு – 1

9 Hours

செய்யுள் திரட்டு வாய்மொழி இலக்கியம்: நாட்டுப்புறப்பாடல்கள்

1. தாலாட்டு
2. காதல்
3. ஒப்பாரி
4. காணிநிலம் வேண்டும் – பாரதி
5. நல்லதோர் வீணை - பாரதி
6. தமிழ்க்காதல் - பாரதிதாசன்
7. தமிழ் வளர்ச்சி - பாரதிதாசன்
8. எந்நாளோ? - பாரதிதாசன்
9. ஆறுதன் வரலாறு கூறுதல் – கவிமணி தேசிக விநாயகம்பிள்ளை

அலகு – 2

9 Hours

1. வழித்துணை - ந. பிச்சமூர்த்தி
2. குருடர்களின் யானை – அப்துல் ரகுமான்
3. முள் முள் முள் - சிற்பி

அலகு – 3 (புதுமைப்பித்தன் கதைகள்)

9 Hours

1. கடவுளும் கந்தசாமிப்பிள்ளையும்
2. செல்லம்மாள்
3. துன்பக்கேணி
4. ஆற்றங்கரைப் பிள்ளையார்
5. ஒருநாள் கழிந்தது

அலகு – 4

9 Hours

1. பெயர், வினை, இடை, உரிச்சொற்களின் பொது இலக்கணம், வலிமிகும் இடங்கள், வலிமிகா இடங்கள்

அலகு – 5

9 Hours

1. தமிழ்க்கவிதையின் தோற்றமும் வளர்ச்சியும் (மரபுக்கவிதை, புதுக்கவிதை)
2. தமிழ்ச்சிறுகதையின் தோற்றமும் வளர்ச்சியும்
3. மரபுத்தொடர்கள், பொருந்திய சொல் தருதல், கலைச்சொற்கள், நேர்காணல்

மேற்பார்வை நூல்கள்:

1. சென்னைப்பல்கலைக் கழக வெளியீடு – 2013
2. பொது இலக்கணம்

Total No of Hrs : 45



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Educational and Research Institute
(DEEMED TO BE UNIVERSITY)
(An ISO Certified Institution)
University with Graded Autonomy Status
Maduravoyal , Chennai - 600 095



Department of Management Studies

HBHI14001	HINDI – I	<table border="1"><tr><td>L</td><td>T</td><td>P</td><td>C</td></tr><tr><td>3</td><td>0</td><td>0</td><td>3</td></tr></table>	L	T	P	C	3	0	0	3
L	T	P	C							
3	0	0	3							

OBJECTIVES:

- Special emphasis on creative writing with phrases and quotes
- Essays of eminent authors have been selected
- Administrative terms prescribed by official language department is taught Prose, Administrative Hindi and grammar

UNIT I

9 Hours

1.Sabhyatakarahasya – lesson and annotations ,Questions & answers, 2. Administrative terms (Prayojanmulak Hindi)

UNIT II

9 Hours

2.Mitrathakarahasya – lesson and annotations questions and answers 2. Patralekhan, definitions, correspondence in hindi

UNIT III

9 Hours

2.Paramanuoorjaevam and kadhyasanrakshan (lesson) annotations and answers, 2. Technical terms and words, letter writing

UNIT IV

9 Hours

1.Yuvavon se (lesson), annotations, essay and questions and answers 2. Types of official correspondence, technical terms 3. Grammer(Change of voice, correcting the sentences)

UNIT V

9 Hours

1.Yogyataaurvyavasaykachunav (Lesson) essay, questions and answers 2. Letter writing 3. Grammer& technical terms

Total No of Hrs : 45

REFERENCE BOOKS:

1.Dr. Syed Rahmatullah & Poornima Prakashan, Hindi gadhyamaala Refrences Dr. Syed Rahmatullah & PoornimaPrakashan, Prayojanmulak Hindi

2. Dakshin Bharat Hindi Prachara Sabha, T.Nagar,Saral Hindi Vyakaran-2



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HBFR18001	FRENCH – I	L	T	P	C
		3	0	0	3

OBJECTIVES

UNIT I

9 Hours

Découvrir le langue française

UNIT II

9 Hours

Faire connaissance

UNIT III

9 Hours

Organizer son temps

UNIT IV

9 Hours

Découvrir son environnement

UNIT V

9 Hours

S'informer, Se faire plaisir

Total No of Hrs : 45

REFERENCE BOOKS:

1.Jacky Girardet, Jacques Pécheur

Available at :Goyal Publishers Pvt Ltd 86, University Block JawaharNagar ,
New Delhi – 110007. Tel : 011 – 23858362 / 23858983



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HBEN17001	ENGLISH – I	<table border="1" style="margin: auto; border-collapse: collapse;"> <tr> <td style="padding: 2px;">L</td> <td style="padding: 2px;">T</td> <td style="padding: 2px;">P</td> <td style="padding: 2px;">C</td> </tr> <tr> <td style="text-align: center;">3</td> <td style="text-align: center;">0</td> <td style="text-align: center;">0</td> <td style="text-align: center;">3</td> </tr> </table>	L	T	P	C	3	0	0	3
L	T	P	C							
3	0	0	3							

OBJECTIVES:

- To prepare students for attaining a comprehensive knowledge of the communication skills
- To make them understand the nuances of the language and use its vocabulary in appropriate contexts
- To develop in students a knowledge of the various techniques in language use
- To develop in them analytical and interpretative skills
- To train learners in organized academic and business writing

Unit I-PROSE- For Detailed Study

9 Hours

- | | |
|-------------------------------|-----------------|
| 1. On Running After One’s Hat | G.K. Chesterton |
| 2. The Unexpected | Robert Lynd |
| 3. How to be a Doctor | Stephen Leacock |

Unit II- POETRY- For Detailed Study

9 Hours

- | | |
|------------------------------------|---------------------|
| 1. Ulysses | Lord Tennyson |
| 2. If | Rudyard Kipling |
| 3. Leave this Chanting and Singing | Rabindranath Tagore |

Unit III- SHORT STORY

9 Hours

- | | |
|----------------------------|--------------|
| 1. A Retrieved Reformation | O’Henry |
| 2. Engine Trouble | R.K. Narayan |

Unit IV – GLIMPSES FROM GREAT MINDS

9 Hours

- | | |
|------------------------|---------------------|
| 1. I lived with words | R.L. Stevenson |
| 2. My Vision for India | Dr. APJ Abdul Kalam |

Unit V - FUNCTIONAL ENGLISH

9 Hours

Enhancing LSRW Skills through Tasks



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Note: Each lesson to be followed by text-based Vocabulary, Grammar, and Usage

Exercises

Synonyms, Antonyms- Affixes (prefixes & Suffixes)-Noun- Adjectives, Verb, Tense, Adverb, Preposition, 'if' clause, Articles, discourse markers, Reported and Direct speech- Voice, Degrees of comparison, Interrogatives
Comprehension, Précis writing

COURSE LEARNING OUTCOME:

Students completing the General English course

1. will be able to attain comprehensive knowledge of the four skills of communication viz.LSRW
2. will be able to understand the nuances of English Language as use its vocabulary in appropriate contexts
3. will have acquired the knowledge of the various techniques in language usage
4. will have acquired proficiency in analytical and interpretative skills
5. will be trained in organized and academic and business writing

Text Books, Reference Books and Web Resources

1. Quest: A Textbook of Communication Skills, Orient Blackswan,
2. Pushkala R, P.A.Sarada, El Dorado: A Textbook of Communication Skills, Orient Blackswan, 2014
3. Padmasani Kannan.S., Pushkala.R. : Functional English
4. Hancock, Mark, English Pronunciation in Use; Cambridge Univ. Press, 2013
5. McCarthy, Michael et.al., English Vocabulary in Use, Advanced, Cambridge Univ. Press, 2011
6. Wren and Martin: Grammar and Composition, Chand & Co, 2006
7. Part I& Part II from Spring Board by Orient Black Swan Pvt. Ltd.



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HBBA18F01	BASIC OF FINANCIAL ACCOUNTING				
		L	T	P	C
		3	1	0	4

OBJECTIVES

- To provide knowledge on the fundamental of financial accounting.
- To expose the student to various financial transaction and its current application.

UNIT I

12 Hours

Accounting principles, conventions and process – Double entry system – Rules – Scope – Limitations – Collection and recording of financial data – Journal – Ledger – Sub-divisions of journal – Trial Balance.

UNIT II

12 Hours

Errors – Types – Rectification of errors – Suspense Account – Bank Reconciliation Statement.

UNIT III

12Hours

Depreciation accounting – Straight line method and Written-down-value method

UNIT IV

12 Hours

Final accounts of sole trading concerns – Accounts of non trading concerns

UNIT V

12 Hours

Average Due Date – Calculation of interest – Account Current – Red ink interest – Forward and backward methods – Daily balance method

Total No of Hours: 60

REFERENCE BOOKS

1. Advanced Accountancy, R.L.Gupta and M.Radhasamy,sultan chand& sons publishers,New Delhi
2. Advanced Accnts, M.C.Shukla and T.S.Grewal .,Chand & Company publishers
3. An introduction to Accountancy ,S.N.Maheswari, Kalyani Publishers Ltd
4. Advanced Accountancy ,M.A.Arulanandam and K.S.RamanHimalaya publishing company
5. Advanced Accountancy ,S.P.Jain and K.L.Narang.,KalyaniPublishers Ltd
6. Advanced Accountancy ,R.S.N.Pillai&Bhagavathi, S.Chand& Company Publishers
7. Financial Accounting,T.S.Reddy and A.Murthy, MarghamPublications



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HBBA18F02	PRINCIPLES OF MANAGEMENT	<table border="1"><tr><td>L</td><td>T</td><td>P</td><td>C</td></tr><tr><td>3</td><td>1</td><td>0</td><td>4</td></tr></table>	L	T	P	C	3	1	0	4
L	T	P	C							
3	1	0	4							

OBJECTIVES

- To introduce the student to the various management concepts
- To explain the various function of management

UNIT I

12 Hours

Management: - Concepts–Nature - Importance - Modern Management approaches

UNIT II

12Hours

Planning: - Nature and importance – Forms – Strategic and tactical – Types of Plans Steps in Planning. Decision-making – Types of decisions – Decision-making process – Rationality in decision-making.

UNIT III

12 Hours

Organisation:- Process of organisation – Organisation structure – Departmentalisation – Span of management – Delegation – Authority, responsibility – Accountability – Decentralisation.

UNIT IV

12Hours

Directing:- Principles – Elements – Motivation – Maslow, Herzberg, Vroom models – Communication process – Forms – Barriers – Overcoming barriers.

UNIT V

12 Hours

Leadership Theories:- Styles – Managerial grid. Co-ordination: Meaning – Need – Types.

Total No of Hours: 60

REFERENCE BOOKS

1. Prasad L N, Reddy & Appanniah, Essentials of Management
2. Lallan Prasad, Koontz, O'Donnel, Essentials of Management
3. Koontz & O' Donnel, Essentials of Management



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HBBA18FA1	MANAGERIAL ECONOMICS	<table border="1" style="margin: auto; border-collapse: collapse;"> <tr> <td style="padding: 2px;">L</td> <td style="padding: 2px;">T</td> <td style="padding: 2px;">P</td> <td style="padding: 2px;">C</td> </tr> <tr> <td style="padding: 2px;">4</td> <td style="padding: 2px;">0</td> <td style="padding: 2px;">0</td> <td style="padding: 2px;">4</td> </tr> </table>	L	T	P	C	4	0	0	4
L	T	P	C							
4	0	0	4							

OBJECTIVES

- This Subject is intended to provide an introduction to basic principle of microeconomics and its application to business decisions
- It highlights importance of macro-economic issues such as the national and accounting, determinant of long run economic growth, trade balance & financial flows
- Graphs would be used to explain various principles

UNIT – I

12 Hours

Firms nature, rationale & objectives of firms, economic profits. Theory of consumer demand & indifference curves, Income effect & Substitution effect of price changes, demand curve, law of demand, changes in demand Vs changes in quantity demanded, Short run Vs long run demand.

UNIT – II

12 Hours

Elasticity of demand meaning, factors and types of elasticity. Demand Estimation- multiple regressions, forecasting models. Production functions, law of production, cost analysis- short and long run cost functions, Economies of Scale & scope, supply analysis, Elasticity of supply, revenue analysis.

UNIT – III

12 Hours

Product market structure, competition, barriers to entry, pricing in different markets – perfect competition, monopoly, Discriminating Monopoly, Monopolistic Competition and Oligopoly, Administer Prices- Floor Price & Price Ceiling, Dual Pricing, Export Pricing.

UNIT – IV

12 Hours

National income accounting , methods of determining national income, GDP- measurement ,Real GDP, price index & inflation, consumption, saving, investment, investment, good–market equilibrium, Balance of payment account.

UNIT – V

12 Hours

Business Cycle, Inflation, Un Employment, Monetary and Fiscal Policy, Exchange Rates- Fixed & Flexible and Economic Policy Economic In the Open Economy, Government Spend & Its Finance.

Total No of Hours: 60

REFERENCE BOOKS:

1. Mithani, D.M, Managerial Economics – Theory & applications, Himalaya pub., 2009, ISBN: 8183188338, ISBN-13: 9788183188333
2. Mehta, P, L, Managerial Economics. Analysis, problem & cases, Sultan Chand, 19th Edition, 2014, ISBN: 9351610212
3. Peterson, H. C and Lewis, W.C. Managerial Economics, prentice Hall, 4th Edition, 2005, ISBN 10: 0139762833 ISBN 13: 9780139762833



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HBTA18002	TAMIL – II	L	T	P	C
		3	0	0	3

நோக்கம்:

- தமிழ் இலக்கிய வரலாற்றில் சிற்றிலக்கியங்கள் பெறும் இடத்தைப்பற்றி எடுத்துரைத்தல்.
- சைவ, வைணவ சமயங்களோடு தமிழ் இலக்கிய மரபு கொண்டுள்ள உறவினைப்போல பிற சமயங்களான கிறித்தவ, இஸ்லாம் சமயங்களோடும் தமிழ் இலக்கியம் உறவுகொண்டு விளங்குவதனை எடுத்துரைத்தல்.
- காப்பிய மரபினை எடுத்துரைத்து ஒருசில காப்பியங்களைப் பயிற்றுவித்தல்.
- அடிப்படை இலக்கணத்தைப் பயிற்றுவித்தல்.

இரண்டாம் பருவம் – தமிழ்த்தாள் 2

அலகு – 1

10. சிற்றிலக்கிய வரலாறு
11. கிறித்துவ இலக்கிய வரலாறு
12. இஸ்லாமிய இலக்கிய வரலாறு

9 Hours

அலகு – 2

4. நந்திக்கலம்பகம்
5. முத்தொள்ளாயிரம்
6. தமிழ்விடு தூது (36 கண்ணிகள்)

9 Hours

அலகு – 3

6. திருக்குற்றாலக்குறவஞ்சி (குறத்தி மலைவளம் கூறுதல்)
7. முக்கூடற்பள்ளு (நாட்டுவளம்)
8. இயேசுபிரான் பிள்ளைத்தமிழ் (செங்கீரைப்பருவம் முதல் 5 செய்யுட்கள்)

9 Hours

அலகு – 4

2. நளவெண்பா (கலிநீங்கு காண்டம்)
3. சீறாப்புராணம் (மானுக்குப் பிணை நின்ற படலம்)

9 Hours

அலகு – 5

4. **இலக்கணக்குறிப்பு** : உவமைத்தொகை, பண்புத்தொகை, உம்மைத்தொகை, வேற்றுமைத் தொகை, வினைத்தொகை இருபெயரொட்டுப் பண்புத்தொகை, அன்மொழித்தொகை
5. ஒருபொருள் குறித்த பலசொல், பலபொருள் குறித்த ஒருசொல்
6. ஒருமை, பன்மை – மயக்கம், பிறமொழிச்சொற்களை நீக்குதல், அகரவரிசைப்படுத்துதல்

9 Hours

மேற்பார்வை நூல்கள்:

3. சென்னைப்பல்கலைக் கழக வெளியீடு – 2013
4. பொது இலக்கணம்

Total No of Hrs: 45



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HBHI14002	HINDI II	<table border="1"><tr><td>L</td><td>T</td><td>P</td><td>C</td></tr><tr><td>3</td><td>0</td><td>0</td><td>3</td></tr></table>	L	T	P	C	3	0	0	3
L	T	P	C							
3	0	0	3							

OBJECTIVES:

- Famous ancient and modern poets from the Hindi literature are prescribed
- Navrasas and meters are taught to keep with latest trends in modern Hindi
- Computer applications in Hindi, provisions of official language Act etc are included

UNIT I

9 Hours

(Poetry, Hindi computing ,alankar), Poetry Manu Ki chintha – kaviparichay, annotation, summary, Madhushala and kabirdhas , two padhya only 2 ,Alankaaranupras, and upma only

UNITII

9 Hours

PoetrySurdas (two padh only), kaviparichay, annotation , Kaikeyikapaschatap, Utprekshaalankar

UNIT III

9 Hours

Meerabai only one padya, Kaamkajihindi, concept of official language, and Hindi computing theory.

UNIT IV

9 Hours

Jugnu, summary & meaning annotation, Hindi software packages.

UNIT V

9 Hours

Kaviparichay, Kabirdas, MeerabaiMythili saran gupta, Jaishankar Prasad, Sleshaalankar.

Total No of Hrs: 45

REFERENCE BOOKS:

- 1.Dakshin Bharat hindiprcharasabha, KavyaKusum- 3
- 2.Murali Manohar&vidhyanilaya,Ras Chand Alankar
- 3.Hareeshvishwavidyalayprakashan, agra, Kaamkajihindi and hindi computing



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HBFR18002	FRENCH II	L	T	P	C
		3	0	0	3

UNIT I **9 Hours**

Cultiveres relations

UNIT II **9 Hours**

Découvrir le passé

UNIT III **9 Hours**

Entreprendre

UNIT-IV **9 Hours**

Prendre des décisions

UNIT IV **9 Hours**

Faire face aux problems and S' evader

Total No of Hrs: 45

REFERENCE BOOKS:

1.Jacky Girardet, Jacques Pécheur Available at :Goyal Publishers Pvt Ltd 86, University Block
Jawahar Nagar New Delhi – 110007.Tel : 011 – 23858362 / 23858983



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HBEN18002	ENGLISH – II	<table border="1" style="margin: auto; border-collapse: collapse;"> <tr> <td style="padding: 2px;">L</td> <td style="padding: 2px;">T</td> <td style="padding: 2px;">P</td> <td style="padding: 2px;">C</td> </tr> <tr> <td style="padding: 2px;">3</td> <td style="padding: 2px;">0</td> <td style="padding: 2px;">0</td> <td style="padding: 2px;">3</td> </tr> </table>	L	T	P	C	3	0	0	3
L	T	P	C							
3	0	0	3							

OBJECTIVES:

- To prepare students to attain a comprehensive knowledge of the communication skills
- To make them understand the nuances of the English language and use the vocabulary in appropriate contexts
- To develop in students a knowledge of the various techniques in language usage
- To develop in them analytical and interpretative skills
- To train learners in organized, academic and business writing

Unit I- PROSE- For Detailed Study 9 Hours

- | | |
|------------------------------|---------------|
| 1. Spoon Feeding | W.R. Inge |
| 2. Disaster Management | B.M. Hegde |
| 3. If You are Wrong Admit it | Dale Carnegie |

Unit II – POETRY- For Detailed Study 9 Hours

- | | |
|----------------------------|-----------------|
| 1. Psalm of Life | H.W. Longfellow |
| 2. Anthem for Doomed Youth | Wilfred Owen |
| 3. Street Cries | Sarojini Naidu |

Unit III – SHORT STORY 9 Hours

- | | |
|-----------------------------------|------------------|
| How Much Land does a Man Need? | Leo Tolstoy |
| 1. Uncle Podger Hangs the Picture | Jerome K. Jerome |

Unit IV – DRAMA 9 Hours

- | | |
|-----------------------------------------|---------------------|
| 1. Excerpts from The Merchant of Venice | William Shakespeare |
| 2. Monkey’s Paw | W.W. Jacob |

Unit V – FUNCTIONAL ENGLISH 9 Hours

Enhancing LSRW Skills through Tasks



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Note: Each lesson to be followed by text-based Vocabulary, Grammar, and Usage Exercises

Synonym and Antonym, Phrasal Verb- Idioms and Phrases, Collocation. Gerund and infinitives, Auxiliaries: Primary and Modals, Use of 'as soon as', 'No soonerthan', 'Hardly had-when', 'Scarcely had-when', 'too....to', 'so...that'- Subject- Verb Agreement

Comprehension, note- making from an unknown passage, Expanding Hints into a meaningful paragraph, Essay writing

COURSE LEARNING OUTCOME:

Students completing the general English course

1. will attain advanced comprehensive knowledge of the four skills of communication viz.

LSRW

2. will understand the nuances of English language as use its vocabulary in appropriate contexts

3. will acquire the advanced knowledge of the various techniques in language usage

4. will acquire advanced proficiency in analytical and interpretative skills

5. will get trained in organized academic and business writing

Total No of Hrs: 45

Text Books, Reference Books and Web Resources

1. Quest: A Textbook of Communication Skills, Orient Blackswan,
 2. Pushkala R, P.A.Sarada, El Dorado: A Textbook of Communication Skills, Orient Blackswan, 2014
 3. Padmasani Kannan.S., Pushkala.R. : Functional English
 4. Hancock, Mark, English Pronunciation in Use; Cambridge Univ. Press, 2013
 5. McCarthy, Michael et.al., English Vocabulary in Use, Advanced, Cambridge Univ. Press, 2011
 6. Wren and Martin: Grammar and Composition, Chand & Co, 2006
- Part I& Part II from Spring Board by Orient Black Swan Pvt. Ltd



Department of Management Studies

HBBA18F03	PRINCIPLES AND ETHICS OF FINANCIAL PLANNING	<table border="1" style="margin: auto; border-collapse: collapse;"> <tr> <td style="padding: 5px;">L</td> <td style="padding: 5px;">T</td> <td style="padding: 5px;">P</td> <td style="padding: 5px;">C</td> </tr> <tr> <td style="text-align: center; padding: 5px;">3</td> <td style="text-align: center; padding: 5px;">1</td> <td style="text-align: center; padding: 5px;">0</td> <td style="text-align: center; padding: 5px;">4</td> </tr> </table>	L	T	P	C	3	1	0	4
L	T	P	C							
3	1	0	4							

OBJECTIVE:

- To introduce the student the fundamental concepts in Financial Planning,
- It also includes various factors that affect the financial planning process as well as the regulatory framework of the financial planning industry.

UNIT I

12 Hours

Financial Planning Process: 6 Step Financial Planning Process: Establishing and Defining the Relationship with the Client – Collecting Client’s Information – Analyzing the Client’s Financial Status – Determination of Personal Financial Goals – Developing Financial Planning Recommendations – Implementing the Recommendations – Monitoring and Reviewing the Client’s Situation - Regulatory Environment for Financial Planning – Regulation related to Individuals – Regulation related to Financial Institutions

UNIT II

12 Hours

Overview of Capital Markets – Market Indices and Parameters – Money Market – Derivatives Market – Foreign Exchange Market – Commodities Market. Debt Management – Purpose of Debt – Long Term Debt vs Short Term Debt – Fixed Rate vs Variable Rate Mortgages – Consumer Loans – Refinancing – Hire Purchase – Credit Cards – Leasing

UNIT III

12 Hours

Personal Financial Statement & Economic Environment Analysis – Cash Inflows and Outflows – Cash Management – Income and Expenditure Statements – Budgeting and Forecasting – Monitoring budgets and provisions for savings.

UNIT IV

12 Hours

Behavioural Finance and Investor Psychology – Prospect Theory – Herd Behaviour – Anchoring and Contrarian Investing – Mental Accounting and Gambler’s Fallacy – Value Investing and Behavioural Finance – Emotions in Financial Decision Making – Skewness of Asset Allocation due to Bias – Basic Investment Style and its Drawbacks.

UNIT V

12 Hours

The Financial Planning Process within a Compliance Framework – Regulations governing Financial Planning and Wealth Management Practice in India – SEBI Investment Advisors Regulations – SEBI Investor Protection Guidelines – RBI Investor Protection Guidelines – PFRDA Investor Protection Guidelines. Code of Ethics of FPSB India – Client First – Integrity – Objectivity – Fairness – Professionalism – Competence – Confidentiality – Diligence FPSB India Rules of Professional Conduct – Practice Standards for a Financial Planning Professional

Total No of Hours: 60

REFERENCE BOOKS

1. Sinha, Madhu Financial Planning : A Ready Reckoner Tata McGraw Hill
2. Mitra, Sid Financial Planning : Theory and Practice SAGE Texts ISBN-10 9351502503 ISBN-13 9351502500
3. Ackert, Lucy Understanding Behavioural Finance SAGE Texts
4. Financial Planning Standards Board India Code of Ethics and Practice Standards]



Department of Management Studies

HBBA18F04	RISK MANAGEMENT AND INSURANCE PLANNING	<table border="1" style="margin: auto;"> <tr> <td style="padding: 5px;">L</td> <td style="padding: 5px;">T</td> <td style="padding: 5px;">P</td> <td style="padding: 5px;">C</td> </tr> <tr> <td style="padding: 5px;">3</td> <td style="padding: 5px;">1</td> <td style="padding: 5px;">0</td> <td style="padding: 5px;">4</td> </tr> </table>	L	T	P	C	3	1	0	4
L	T	P	C							
3	1	0	4							

OBJECTIVES:

- To familiarize students with the concepts of risk and insurance as well as to understand insurance requirements
- To calculate the amount of insurance required from financial planning perspective

UNIT I

12 Hours

Introduction to Risk – Perils and Hazards –Types of Risk – Risk Management Techniques – Pooling of Risk – Insurance as a Risk Management Tool – Law of Large Numbers –Insurable Risk – Self-Insurance - Advantages and Disadvantages of Insurance in Risk Management – Difference Between Hedging and Insurance

UNIT II

12 Hours

Fundamentals Principles of Insurance – Indemnity – Insurable Interest – Utmost Good Faith – Subrogation – Contribution – Proximate Cause - Reinsurance – Risk Control and Risk Financing– Insurance Underwriting – Types of Insurance: Life and Non-Life - Overview of Insurance Sector in India – Regulatory aspects of Insurance and Agency Law – IRDA

UNIT III

12 Hours

The Insurance Contract – Features of the Insurance Contract – Legal Characteristics of an Insurance Contract – Insurance Policy Documents and their Legal Implications – Terms in an Insurance Contract – Other Provisions of Insurance Contracts

UNIT IV

12 Hours

Insurance Pricing and Premium Calculation – Rate Making – Analysis and Selection of Insurance Products – Assessment and Identification of Risk Exposure – Analysis of Life Insurance Needs – Calculations of Claim Amount and Other Benefits

UNIT V

12 Hours

Health Insurance and Accident Insurance – Types of Health Insurance Products – Personal Disability Insurance – Property and Liability Insurance – Other Business Specific Insurance

Total No of Hours: 60

REFERENCE BOOKS

1. Harrington and Niehaus, ‘Risk management and Insurance, Tata Mcgraw Hill Publishing, NewDelhi, 3rd Edition, 2010.
2. Trieschman, Hoyt, Sommer, ‘Risk management and Insurance, Cengage Learning, 3rd Edition,2011.
3. Mark S. Dorfman, Introduction to Risk management and Insurance, 10th Edition, Prentice hall ofIndia, 2011.
4. Stulz, Risk management and Derivaties, Cengage Learning, 2nd Edition, 2011.
5. Skipper and Kwon, Risk management and Insurance, Blackwell Publishing, 2009.



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HBBA18FA2	APPLIED PERSONAL FINANCE	<table border="1"><tr><td>L</td><td>T</td><td>P</td><td>C</td></tr><tr><td>3</td><td>1</td><td>0</td><td>4</td></tr></table>	L	T	P	C	3	1	0	4
L	T	P	C							
3	1	0	4							

OBJECTIVES:

- To make students understand and apply the various concepts in financial mathematics
- To solve financial planning problems that they may encounter in the real world

UNIT – I: 12 Hours

Time Value of Money – Present Value – Future Value – PV & FV of a Lump Sum – PV and FV of Annuities

UNIT – II: 12Hours

Returns – Nominal Rate – Effective Rate – Real Rate – Internal Rate of Return – Internal Rate of Return of Irregular Cash Flows – Compounded Annual Growth Rate .

UNIT – III: 12 Hours

Loan – EMI– Loan Repayment Schedules – Repayment with Varying Interest Rates

UNIT – IV: 12Hours

Financial Ratios – Net worth and its components – Liquidity Ratios – Debt to Income Ratio – Debt to Financial Assets – Debt to Total Assets – Savings Ratio.

UNIT – V: 12Hours

Application of Financial Mathematics in Financial Planning Situations

Total No of Hours: 60

REFERENCE BOOKS:

1. Chandra, S. Financial Mathematics : An Introduction , Alpha Science International ISBN-10: 8184870965 ISBN-13: 978-8184870961
2. Hastings, Kevin: Introduction to Financial Mathematics: CRC Press ISBN 9781498723909



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HBBA18F05	RETIREMENT PLANNING AND EMPLOYEE BENEFITS	<table border="1" style="margin: auto; border-collapse: collapse;"> <tr> <td style="padding: 5px;">L</td> <td style="padding: 5px;">T</td> <td style="padding: 5px;">P</td> <td style="padding: 5px;">C</td> </tr> <tr> <td style="text-align: center;">4</td> <td style="text-align: center;">0</td> <td style="text-align: center;">0</td> <td style="text-align: center;">4</td> </tr> </table>	L	T	P	C	4	0	0	4
L	T	P	C							
4	0	0	4							

OBJECTIVES:

- To familiarize students with the concepts behind Retirement Planning and the various strategies needed to create a retirement corpus
- To familiarize students with the various Employee Benefits schemes that are available for employees in India
- To create strategies for implementing such schemes as part of a financial plan

UNIT – I

12 Hours

Introduction to Retirement Planning – Significance of Retirement Planning – Purpose and Need of Retirement Planning – Role of Financial Planner in Retirement Planning. Life Cycle Analysis– Early earning stage and established earning stage – Stability and Visibility of earning– Pre-retirement phase and Post-retirement phase – Life expectancy vs Retirement age – Early retirements vs Delaying retirement – Post retirement activities and goals – Risk of living longer than expected.

UNIT – II

12 Hours

Factors in Retirement Planning – Analysis of a Client’s Retirement Needs – Determining Financial Objectives on Retirement – Estimating household expenses on retirement – Sustainable assets through retirement.

UNIT – III

12 Hours

Wealth creation factors and principles – Income and savings ratio – Allocation of savings to asset classes – Overall effective yield and effect of taxes – Wealth protection and erosion of wealth. Retirement Planning Strategies – Pre-retirement strategies – Estimation of corpus to be accumulated – Optimization of rate of return – Asset Allocation strategies – Selection of Annuity Products – Post-retirement Strategies – Creation of regular income stream post retirement – Reverse Mortgage – Retrenchment of expenses – Contingency funds. Salary and Bonus – Reimbursement of expenses – Health benefits – Group Insurance – Allowances – LTA – Concessional Loans

UNIT IV

12 Hours

Superannuation Benefits and Schemes – Gratuity Provisions – Tax Benefits of Superannuation funds – Retirement Benefits – Voluntary Retirement and Death – Leave Encashment – Tax Free Limits. Defined Benefits Plans – Workmen Compensation Scheme – Employees Deposit Linked Insurance Scheme – Applicability and withdrawal norms of defined benefits plans – Taxability of Defined Benefits Plans

UNIT – V

12 Hours

Defined Contribution Plans – Employees Provident Fund – Employees Pension Scheme– Employees State Insurance – Central Govt Employees Group Insurance Scheme – Applicability and Withdrawal norms of Defined Contribution Plans – Taxability of Defined Contribution Plan

Total No of Hours: 60

REFERENCE BOOKS

1. Yolles, Ronald M. Getting Started in Retirement Planning John Wiley and Sons
2. Mohapatra, R.K. Retirement Planning Blue Rose Publishers



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HBBA18F06	VALUATIONS	<table border="1"><tr><td>L</td><td>T</td><td>P</td><td>C</td></tr><tr><td>4</td><td>0</td><td>0</td><td>4</td></tr></table>	L	T	P	C	4	0	0	4
L	T	P	C							
4	0	0	4							

OBJECTIVE:

To familiarize and update the students with the basic principles of valuation, and the different techniques used to value investments from a financial planning perspective.

UNIT – I

12 Hours

Fundamental Principles of Value Creation – Conservation of Value and Role of Risk – Returns on Invested Capital – Growth

UNIT – II

12 Hours

Discounted Cash Flow Valuation – Relative Valuation – Contingent Claim Valuation

UNIT – III

12 Hours

Analyzing Performance – Understanding Financial Statements – Asset Measurement and Valuation – Forecasting Performance and Estimating Growth –Risk – Option Pricing – Market Efficiency

UNIT – IV

12 Hours

Measuring Earnings and Cash flows – Dividend Discount Model – Terminal Value – Firm Valuation – Equity Value per Share – Earnings Multiples – Book Value Multiples – Revenue and Sector Specific Multiples

UNIT – V

12 Hours

Valuation of Companies – Valuations of Startups – Valuation of Other Assets

Total No of Hours: 60

REFERENCE BOOKS:

1. Damodaran Aswath Investment Valuation: Tools and Techniques Wiley
2. Damodaran Aswath Damodaran on Valuation Wiley



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HBBA18F07	FIXED INCOME SECURITIES	<table border="1" style="margin: auto; border-collapse: collapse;"> <tr> <td style="padding: 2px;">L</td> <td style="padding: 2px;">T</td> <td style="padding: 2px;">P</td> <td style="padding: 2px;">C</td> </tr> <tr> <td style="text-align: center; padding: 2px;">4</td> <td style="text-align: center; padding: 2px;">0</td> <td style="text-align: center; padding: 2px;">0</td> <td style="text-align: center; padding: 2px;">4</td> </tr> </table>	L	T	P	C	4	0	0	4
L	T	P	C							
4	0	0	4							

OBJECTIVES:

- To make students understand the valuation and application of a wide variety of fixed income securities and their derivatives
- To introduce them to at least one equilibrium model and one no-arbitrage model and to analytical tools used in interest rate modeling and risk management

UNIT – I **12 Hours**

Introduction to Fixed Income Securities – Fixed Income Markets – Bond Markets – Money Markets – Asset Backed Securities – Repo Market – Derivatives Market

UNIT – II **12 Hours**

Bond Valuation – Discount Factors – Interest Rates – Coupon Bonds – Floating Rate Bonds - Interest Rate Variations – Duration – Interest Risk Management – Asset Liability Management – Convexity – Slope and Curvature

UNIT – III **12 Hours**

Interest Rate Derivatives – Forward Rates and Forward Discount Factors – Forward Rate Agreements – Forward Contracts – Interest Rate Swaps – Interest Rate Futures – Options

UNIT –IV **12 Hours**

Term Structure Models – Volatility and Distribution – Drift – Gauss and LIBOR Market Models

UNIT – V **12 Hours**

Repurchase Agreements and Financing – Corporate Bonds and Credit Default Swaps – Mortgages and Mortgage Backed Securities

Total No of Hours: 60

REFERENCE BOOKS:

1. Fabozzi, Frank Bond Markets, Analysis and Strategies Pearson
2. Sundaresan, Suresh Fixed Income Markets and their Derivatives Elsevier
3. Veronesi, Pietro Fixed Income Securities Wiley



Department of Management Studies

HBMA18F01	FINANCIAL STATISTICS				
		L	T	P	C
		3	1	0	4

OBJEVTIVE:

- It includes all numerical data that summarizes past behavior or forecasts future behavior of individual financial security, a group of securities, or markets in a broad geographic region

UNIT I (THEORY)

12 Hours

Data Definition, Types, Collection of data – Primary and Secondary Data – Questionnaire and schedules.

UNIT II

12 Hours

Measures of Central tendency – Mean – Median – Mode – Geometric Mean – Harmonic Mean – Measures of dispersion – Range – Quartile deviation – Mean deviation – Standard deviation.

UNIT III

12 Hours

Correlation –Karl Pearson`s co-efficient of correlation– Rank correlation – Regression analysis. (Simple problems)

UNIT IV

12 Hours

Definition - Limitations and uses of Index numbers - Construction of index number by aggregate expenditure method and family budget method using Laspeyre`s - Paasche`s and Fisher`s Formula.

UNIT V

12 Hours

Meaning of Time series - Various components of Time series: Trend, Seasonal, Cyclic and Random components - Methods of measuring Trend by (a) Graphical method (b) Moving average method.(Simple problems).

Total No of Hours: 60

REFERENCE BOOKS

1. GuptaS.C.,Kapoor V.K., Fundamentals of Mathematical Statistics, S.Chand & Co.,(2007)
2. Sharma.J.K., Business Statistics, Vikas Publishing., (2016)
1. Statistical methods: Dr.S.P.Gupta Sultan chand& sons, New Delhi.
2. Statistics,Theory&Practice:R.S.N.Pillai&Baghavathy–S.Chand&Company New Delhi.
3. Business Statistics: G.C.Beri Tata McGraw-Hill Edition.
4. Statistical Methods: Sanchetti and Kapoor, Sultan Chand & Co.,
5. Business Statistics: M.Wilson – Himalaya Publishing House, Mumbai.
6. Statistical Methods: ,M.Manoharan, PalaniParamounts Publications.
7. Business Mathematics and Statistics :P.R.Vittal, Margham Publications.



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HBBA18F08	PRINCIPLES OF MARKETING	<table border="1" style="margin: auto; border-collapse: collapse;"> <tr> <td style="padding: 5px;">L</td> <td style="padding: 5px;">T</td> <td style="padding: 5px;">P</td> <td style="padding: 5px;">C</td> </tr> <tr> <td style="text-align: center; padding: 5px;">3</td> <td style="text-align: center; padding: 5px;">0</td> <td style="text-align: center; padding: 5px;">0</td> <td style="text-align: center; padding: 5px;">3</td> </tr> </table>	L	T	P	C	3	0	0	3
L	T	P	C							
3	0	0	3							

OBJECTIVE:

- This course is designed to serve as an introduction to the basic principles of marketing, practices, and the application of these practices. .

UNIT I

9 Hours

Marketing – Evolution of Marketing – Marketing Concepts - Market Segmentation – Need for Market Segmentation – Criteria for Segmentation – Marketing Mix.

UNIT II

9 Hours

Product Policy – Branding and packaging – Introduction of new products – Product life cycle– Classification of consumer goods.

UNIT III

9 Hours

Place of Marketing-Functions of Marketing – Buying – Assembling – Selling – Transportation – Storage and Warehousing – Risk bearing – Grading and Standardization – Financing.

UNIT IV

9 Hours

Pricing policy - its objectives – Methods of pricing – Pricing strategies – Factors influencing price decisions

UNIT V

9 Hours

Promotion policy- Advertising and its advantages – Various media of advertisement – Personal selling and salesmanship – Qualities of a successful salesman – Sales promotion

Total No of Hours: 45

REFERENCE BOOKS

1. Principle of Marketing , N. Rajan Nair, Sultan Chand & Sons
2. Modern Marketing,R.S.N. Pillai and V. BhagavathiS.Chand&Co.,
3. Marketing, Kathiresan and Radha,Prasanna Publishers
4. Marketing , J.Jayakumar,Margham Publications.,
5. Marketing Management ,C.B.Gupta &N.RajanNair,sultan Chand & Sons
6. Marketing Management, C.N.Sontakki, Kalyani Publishers.
7. Essentials of Marketing Management , Debraj Datta&Mahua Datta,Virinda Publication



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HBBA18FL1	SPREADSHEETS FOR FINANCE	<table border="1"><tr><td>L</td><td>T</td><td>P</td><td>C</td></tr><tr><td>0</td><td>0</td><td>2</td><td>2</td></tr></table>	L	T	P	C	0	0	2	2
L	T	P	C							
0	0	2	2							

OBJECTIVE:

- To familiarize students with the use of Spreadsheets for financial calculations, including using various financial functions to prepare financial plans.

UNIT – I

Introduction to Spreadsheets – Cells and Ranges – Navigation – Formatting – Naming Cells and Ranges – Creating Charts - Working with Multiple Workbooks

UNIT – II

Absolute and Relative References – R1C1 Notation – Formulas and Functions – Custom Formats– Format Painter – Conditional Formatting – Data Validation

UNIT – III

Working with data in spreadsheets - Sorting and Filtering Data – Pivot Tables & Pivot Charts- Working with Text – Functions for Manipulating Text – Recalculating – Creating Macros

UNIT – IV

Financial Functions – Creating Financial Models using Spreadsheets – Logical Functions Lookup Functions – Dynamic Charts – Goal Seek Function

UNIT V

Creating different models – Valuation of Stocks – Valuation of Bonds – Bond Yields – Dividend Valuation – Free Cash Flow – Residual Income – EVA – Claims Valuation – Options Analysis – Regression Analysis – Scatter Plots and Trend Lines – ANOVA tables – 2 variable regression analysis

REFERENCE BOOKS

1. Fairhurst, Daniel Stein Using Excel for Business Analysis Wiley ISBN-10: 1119062462, ISBN-13: 978-1119062462
2. Day, Alastair Mastering Financial Modelling in Microsoft Excel Pearson ISBN-10: 0273772252, ISBN-13: 978-0273772255
3. Walkenbach, John Excel Bible Wiley ISBN-10: 8126558946, ISBN-13: 978-8126558940



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HBBA18F09	INVESTMENT ANALYSIS	<table border="1" style="margin: auto; border-collapse: collapse;"> <tr> <td style="padding: 2px;">L</td> <td style="padding: 2px;">T</td> <td style="padding: 2px;">P</td> <td style="padding: 2px;">C</td> </tr> <tr> <td style="padding: 2px; text-align: center;">3</td> <td style="padding: 2px; text-align: center;">1</td> <td style="padding: 2px; text-align: center;">0</td> <td style="padding: 2px; text-align: center;">4</td> </tr> </table>	L	T	P	C	3	1	0	4
L	T	P	C							
3	1	0	4							

OBJECTIVE:

- To teach students the various tools available for analysis of investment options from a financial planning perspective.

UNIT I

12 Hours

Investment Products and their Applications – Fixed Income Products – Mutual Fund Products – Equity Market – Derivatives and Commodities – FOREX – Real Estate and Other Investments

UNIT II

12 Hours

Risk Profiling – Types of Investment Risks – Product Profiling in terms of Inherent Risk – Risk Profiling of Investors – Asset Allocation Strategies

UNIT III

12 Hours

Goal Based Investment Planning – Selection of Investment Products to achieve a Goal – Additional Lumpsum Investments vs Systematic Staggered Investments – Monitoring Progress in Investment Portfolio for Goal Achievement – Addressing Risk Aversion – Avoiding Speculation

UNIT IV

12 Hours

Regulatory Aspects of Investment Products – RBI Act – SEBI Act – SCR Act – FEMA – Disclosure and Investor Protection Guidelines of SEBI – Grievance Mechanisms, SEBI Ombudsman Regulations – RTI Act – Forward Contracts Regulation Act – SEBI Investment Advisors Regulations

UNIT V

12Hours

Major Stock Exchanges – Major Commodity Exchanges – Depositories – Primary and Secondary Market Intermediaries – Merchant Bankers - Stock Brokers – IFAs – CFPs.

Total No of Hours: 60

REFERENCE BOOKS

1. Kane, Alex Investments McGraw Hill Education
2. Chandra, Prasanna Investment Analysis and Portfolio Management McGraw Hill Education
3. Cleetus, Regina Sibi and Sasikumr, K Capital Market and Depository System in India New Century Publication



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HBBA18F10	DERIVATIVES				
		L	T	P	C
		3	1	0	4

OBJECTIVES:

- To familiarize students with financial derivatives and make them learn the fundamental concepts related
- To pricing and hedging of derivative securities and use them for investment and risk management

UNIT – I **12 Hours**
 Introduction to Derivative Securities - Types of Derivatives, Derivatives Markets, Derivate Pricing,

UNIT – II **12 Hours**
 Forwards and Futures – Markets for Forwards and Futures – Market to Market and margins – Valuing Forward Contracts and the Forward Price – Futures Pricing

UNIT – III **12 Hours**
 Options – Pricing of Options – No Arbitrage Restrictions – Put / Call Options – Trading Strategies involving Options

UNIT – IV **12 Hours**
 Valuing Derivatives – Binomial model – Black Scholes Model – Monte Carlo Simulation – Volatility Estimation and Implied Volatility

UNIT – V **12 Hours**
 Hedging – Delta, Gamma, Vega, Theta and Rho – Delta hedging – Asset Mismatch – Maturity Mismatch – Basis Risk – Minimum variance Hedging – Delta Gamma Hedging using Options – Value at risk

Total No of Hours: 60

REFERENCE BOOKS:

1. Hull, John C Fundamentals of Futures and Options Markets Prentice Hall
2. McDonald Derivatives Markets Pearson
- 3.



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HBBA18F11	PORTFOLIO MANAGEMENT	L	T	P	C
		4	0	0	4

OBJECTIVE:

To familiarize students with the latest theories in Portfolio Management and help them to apply the concepts in managing portfolios of clients from a financial planning perspective.

UNIT I

12 Hours

Measuring Risk in a Portfolio - Beta and Portfolio Beta – Variance, Semi-Variance and Co-Variance – SD in a Portfolio – Correlation

UNIT II

12 Hours

Measuring Returns in a Portfolio – Time Weighted Return and Rupee Weighted Returns – HPR and CAGR – YTM YTC and CY – Performance of Stocks – EPS – P/E Ratio – P/B Ratios – DDM – Analysis of Growth – Measurement and Evaluation of Portfolio Performance

UNIT III

12 Hours

Active Investment Strategies – Dynamic management of Asset Allocation across Classes – Churning of Portfolios – Speculation, Hedging and Arbitrage Strategies – Options and Futures – Market Timing – Value vs Growth

UNIT IV

12 Hours

Passive Investment Strategies – Buy and Hold – Index Investing – SIP – SWP and STP – VIP

UNIT V

12 Hours

Investment Portfolio Management – Sharpe, Treynor and Jensen’s Ratio – CAPM – CML – SML – MPT – Monte Carlo Simulation for Portfolio Optimization

Total No of Hours: 60

REFERENCE BOOKS

1. Kane, Alex Investments McGraw Hill Education
2. Chandra, Prasanna Investment Analysis and Portfolio Management McGraw Hill Education



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HBBA18F12	PERSONAL INCOME TAX	L	T	P	C	
		4	0	0	4	

OBJECTIVE:

- To students with a framework to understand the fundamental concepts in personal income tax from a financial planning perspective
- To help them learn the various strategies in tax planning

UNIT I

12 Hours

Features of Indian Tax System – Direct and Indirect Taxes – Indian Direct Tax Structure – IT Act and IT Rules – Tax Compliance Matters – Residency Rules

UNIT II

12 Hours

Taxability of Various Incomes - Salary Income - Income form House Property – Income from Business or Profession – Capital Gains in Transfer of Capital Assets – Income from Residuary Sources and Tax Calculation Rules – Tax Characteristics of Business Forms

UNIT III

12 Hours

Taxation of Financial Products and Financial Transactions – Tax Implications for NRIs – Tax Planning Avenues and Techniques – Tax Planning vs Tax Evasion and Avoidance – Tax Planning vs Tax Management – Deferral of Tax Liability – Maximizations of Exclusions and Credits – Managing Loss Limitations

UNIT IV

12 Hours

Taxability of Financial Products – PPF and Small Savings Schemes – Equity Shares – Equity Transactions – Equity Oriented Products – Debt Products – Income Distribution and Dividends on Various Investment Products – STT and DDT – ULIPS and ULPPS – Annuities, Pension Products and Reverse Mortgage Scheme

UNIT V

12 Hours

Taxation of Financial Transactions – Transaction in nature of Gifts / Prizes / Winnings – Agricultural Income – Cash Payments over a Specified Limit – Dividend and Bonus Stripping Provisions – Shares, MF Schemes including with reinvestment options

Total No of Hours: 60

REFERENCE BOOK:

1. Singhania, VinodStudents Guide to Income Tax Taxmann Publications
2. Singhania, VinodStudents Guide to Income Tax : Problems and Solutions Taxmann Publications



Department of Management Studies

HBBA18F13	MARKETING OF FINANCIAL SERVICES	<table border="1" style="margin: auto; border-collapse: collapse;"> <tr> <td style="padding: 5px;">L</td> <td style="padding: 5px;">T</td> <td style="padding: 5px;">P</td> <td style="padding: 5px;">C</td> </tr> <tr> <td style="text-align: center; padding: 5px;">4</td> <td style="text-align: center; padding: 5px;">0</td> <td style="text-align: center; padding: 5px;">0</td> <td style="text-align: center; padding: 5px;">4</td> </tr> </table>	L	T	P	C	4	0	0	4
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OBJECTIVE:

- To make students understand the concepts in marketing various financial services and products, including helping them understand the difference between Sales and Marketing of Financial services
- To identify target markets, market segmentation, building an effective marketing plan, developing an effective value propositions and a practical strategy to competitively sell financial services.

UNIT I

12 Hours

Overview of Marketing and Indian Financial Services Industry – Products and Services – Strategic Nature of Marketing and Marketing Orientation – Stakeholder theory and the six markets framework

UNIT II

12 Hours

Customer buying behavior – Customer attributes relevant to financial services marketing – Customer value – Marketing environment – Competition and Competitive Advantage – Segmentation, targeting and positioning

UNIT III

12 Hours

Marketing Mix for Financial Services – 7 Ps and 4Cs of Marketing

UNIT IV

12 Hours

Strategic Marketing Planning Process – Value Based Marketing – Relationship Marketing Paradigm – Marketing driven versus market driving – Marketing Management Process

UNIT V

12 Hours

Relationship marketing and Customer Service – Analysis of Customer Behaviour and Service Experience - Relationship lifecycle – Measuring Service Quality – Complaint Handling

Total No of Hours: 60

REFERENCE BOOKS

1. Ennew, C and Waite, N. Financial Services Marketing: An International Guide to Principles and Practice Routledge
2. Alder, B and Hoffman, R The Basic Book of Marketing Financial Services



Department of Management Studies

HBBA18FL2	INTERVIEW TECHNIQUES				
		L	T	P	C
		0	0	2	2

OBJECTIVE:

To spread knowledge about the interview techniques and make them learn about facing the challenges in interview

OUTCOMES

KNOWLEDGE OF:

- Types of interviews
- Interview preparation steps and tips
- Stages of an interview
- Common and illegal questions
- Developing effective answers

TYPES OF INTERVIEWS

- Structured / non-structured
- One-on-one / panel / group
- Responsive / reactive (stress interview)
- Phone (pre-screening)
- Informational Traditional / Behavioral



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HBBA18F14	ESTATE PLANNING	L	T	P	C
		4	0	0	4

OBJECTIVE:

To familiarize students with the fundamental concepts in estate planning and to help them create effective estate planning strategies for financial planning.

UNIT I

12 Hours

Estate Planning Fundamentals – Purpose and Need of Estate Planning – Risks and Drawbacks Involved in Estate Planning – Hindu and Indian Succession Act – Succession – Testate and Intestate

UNIT II

12 Hours

Estate Planning Process – Estimation of Value of Estate and Costs of Transfer – Development of Plan of Transfer – Implementation of Estate Transfer Plan

UNIT III

12 Hours

Methods of Estate Planning – Wills – Trusts – Insurance – Gift – Power of Attorney – Transfer of Property and Partition

UNIT IV

12 Hours

Indian Trust Act – Classification of Trusts – Characteristics of Trusts – Family Trust vs Wills – Hybrid Trusts – Cancellation and Revocation of Trust – Trust Structure for Efficient Transfer – Tax Efficient Structures – Trust Perpetuities – Trust as Pass-through entity – Direct acquisition of assets – Distributable net income

UNIT V

12 Hours

Intra family business and Property Transfer – Calculating the value of the family business Transfer of Business and Inter-generation Wealth Transfer – Forms of Property Transfer – Offshore Trusts and Regulatory Requirements – Asset Protection and Creditor Protection Period

Total No of Hours: 60

REFERENCE BOOKS:

1. Aiyar, S Krishnamurthi Commentary on the Indian Trusts Act Universal Law Publishing
2. Lakhota, R N Succession and Tax Planning through Trusts and Wills Vision Books



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HBBA18F15	WEALTH MANAGEMENT	L	T	P	C
		3	1	0	4

OBJECTIVE:

To provide an in-depth conceptual and practical guide to domestic and international wealth management for high net worth individuals and families. .

UNIT – I **12 Hours**
 Private Banking Industry – Market Segmentation – Service Offerings – Competitive Landscape

UNIT – II **12 Hours**
 Setting the Framework for Private Banking –Management Requirements for Wealthy Families

UNIT – III **12 Hours**
 Risk Dynamics and Offshore Private Banking – Regulatory Issues – Anti Money Laundering – Investment Strategies

UNIT – IV **12 Hours**
 Portfolio Management and Rebalancing – Asset Allocation and Concentration

UNIT – V **12 Hours**
 Alternative Investments – Hedge Funds – Private Equity Investments – Commodities – Leveraged Buyouts – Real Estate

Total No of Hours: 60

REFERENCE BOOKS:

1. Anson, Mark J. P. Handbook of Alternative Assets John Wiley and Sons
2. Rosenbaum, Joshua Investment Banking Wiley
3. Maude, David Global Private Banking and Wealth Management Wiley



Department of Management Studies

HBBA18F16	BUSINESS STRATEGY	L	T	P	C
		4	0	0	4

OBJECTIVES:

- To develop your reasoning in managerial judgments and help you learn how to assess business risks
- To improve your ability to make sound business decisions and achieve effective outcomes

UNIT I

12 Hours

Introduction to Business Strategy: Introduction, Concept of Business Strategy, Need for Business Strategy, Essentials of Effective Strategy, Effects of Inadequate Strategies, Functions of Business Strategies

UNIT II

12 Hours

Business Policy: Introduction, Definition of Business Policy, Factors influencing Business Policy, Business Policy vs. Strategy, Policy decisions and their impact on Business Strategies

UNIT III

12 Hours

Introduction to Strategic Management: Introduction, Strategic Management – Definition, Meaning and Role, Objectives of Strategic Management, Benefits of Strategic Management, Importance of Strategic Management, Causes for failure of Strategic Management

UNIT IV

12 Hours

Strategic Management Process: Introduction, Strategic Management Process, Strategic Vision and the role of a Strategist, Criteria for Effective strategy, Role of Strategic Management in Policy Making

UNIT V

12 Hours

Strategic Analysis: Introduction, Strategic Analysis – definition, Need for Strategic Analysis & Environmental Scanning, Understanding environment of business for strategic analysis, Strategic thinkers & their contributions, Role of Strategic Analysis in Policy making.

Total No of Hours: 60

REFERENCE BOOKS

1. Adrian Haberberg and Alison Rieple, The Strategic Management of Organisations, Prentice-Hall, 2001.
2. Robert M Grant, Contemporary Strategy Analysis, 4th Edition, Blackwell, 2002.
3. Garth Saloner, Andrea Shepard and Joel Podolny, Strategic Management, Wiley 2001.
4. Shiv Mathur and Alfred Kenyon, Creating Value, Successful Business Strategies, 2nd Edition Butterworth Heinemann, 2001.
5. David Collis and Cynthia Montgomery, Corporate Strategy –



Department of Management Studies

HBBA18F17	SHARE MARKET OPERATIONS	L	T	P	C
		4	0	0	4

OBJECTIVES:

- To explain the meaning and functions of stock exchanges
- To highlight the role of SEBI in regulating stock exchanges
- To give advantages and limitations of stock exchanges
- To discuss the stock exchanges in India

UNIT I

12Hours

Company –Meaning –Definitions –types of companies.

UNIT II

12Hours

Share –meaning –types of shares –how to apply for shares – primary market – secondary market –market conditions –bull-bear.

UNIT III

12 Hours

Stock exchanges in India –NSE, BSE –Sensex Nifty.

UNIT IV

12 Hours

Investments in shares – Dmat – Trading account on line and off line trading of shares –day trading.

UNIT V

12 Hours

SEBI –functions – concepts of capital gain dividend –EPS- market capitalization –listed companies –NCFM – PAN –price band –STT – STOP LOSS –Volatility

Total No of Hours: 60

REFERENCE BOOKS

1. Securities &Portfolio management - PunithavathiPandiyan
2. Magazines practical banking advances – H.L.Bedi,V.K.Hardikar



Department of Management Studies

HBBA18F18	SALES MANAGEMENT	<table border="1" style="margin: auto;"> <tr> <td>L</td> <td>T</td> <td>P</td> <td>C</td> </tr> <tr> <td style="text-align: center;">3</td> <td style="text-align: center;">0</td> <td style="text-align: center;">0</td> <td style="text-align: center;">3</td> </tr> </table>	L	T	P	C	3	0	0	3
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OBJECTIVE:

This course also provides an understanding of the tools and techniques necessary to effectively manage the sales function, the sales organization and the sales individual

UNIT I 9 Hours

Organisation Frame work of the Field Sales Force:-Types and methods of Field Sales Organisation – Career in Field Sales Management. Field Sales Manager – tasks and responsibilities – Relation with Salesman and relationships with Top Management – Coordinating and controlling the marketing mix. Operating Environment for field sales force.

UNIT II 9 Hours

Information and Planning:-Qualities and role- Hierarchy of objectives and goals, concept of strategies and tactics. Development of sales performance standards –Relationships of performance standards to sales development function, its purpose and types, check on training and staffing programs. Sales forecasting – Methods and procedural steps in forecasting

UNIT III 9 Hours

Operational Management:-Staffing– responsibilities, tools and methods of selection. Motivational and compensation procedures for sales force – method of financial incentives and its purpose – Designing a compensation plan

UNIT IV 9 Hours

Distribution Management:-Introduction: Role of distribution in the marketing mix Role and Functions- Transport and Handling: Economic of transportation, determining optimum mode of transport – Organisation, machines, procedures and documentation.

UNIT V 9 Hours

Dealer Network:- Role of middlemen/dealer in marketing and distribution. Dealer functions at Wholesale and retail level. Strategic plan of network – Location, Selection, Appointment; and Termination of dealers, Morale and Motivation.

Total No of Hours: 45

REFERENCE BOOKS

1. Still RR and CondiffGovoni, Sales Management: Prentice Hall of India 2002.
2. Johnson Sales Management, concept Practices and Cases, New York, McGraw Hill
3. Stop, Ask and Listen’, Kelley Robertson, Macmillan, 2002.101
4. Geoffrey Lancarter and David Jobber, Selling and Sales Management, Macmillan1998.
5. Anderson R, Professional Sales Management, Prentice Hall, 1992.
6. Dalrymple, Sales Management: Concept and Cases, New York, John Wiley 1989.



Department of Management Studies

HBBA18F19	FINANCIAL MANAGEMENT	L	T	P	C
		3	1	0	4

OBJECTIVES:

- To acquaint the students regarding financial management tools and techniques in financial decision making
- To make students understand maximizing the value of money, identifying optimal capital structure, determines the dividend policy, maintenance of working capital

UNIT I

12 Hours

Meaning, objective and scope - Relationship between management accounting, Cost accounting and financial accounting - Financial statements - Tools for analysis and interpretation.

UNIT II

12 Hours

Financial planning and control - Break-even analysis - Operating leverage - Cost - volume - Profit analysis.

UNIT III

12 Hours

Cost of capital - Basic concepts, rational assumptions - Cost of equity capital - Cost of debt - Cost of preference capital - Cost of retained earnings.

UNIT IV

12 Hours

Capital structure decision of the firm - Composition and sources of long-term funds- Financial leverage - Factors determining funds requirements.

UNIT V

12 Hours

Financial Information systems

Total No of Hours: 60

REFERENCE BOOKS

1. Financial Management - Prasanna Chandra
2. Khan and Jain - Financial Management
3. Pandey I M - Financial Management
4. Vanhorne - Fundamentals of financial management.



Department of Management Studies

HBBA18F20	FINANCIAL PLAN CONSTRUCTION	<table border="1"><tr><td>L</td><td>T</td><td>P</td><td>C</td></tr><tr><td>3</td><td>1</td><td>0</td><td>4</td></tr></table>	L	T	P	C	3	1	0	4
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OBJECTIVE:

This course is intended to familiarize the students with the methods used to create a financial plan for clients based on various strategies.

UNIT – I

12 Hours

Overview of a Financial Plan – Components of a Financial Plan – Professional, Legal and Ethical Requirements

UNIT – II

12 Hours

Client-Advisor Relationship – Effective Communication Strategies for Client Engagement – Gathering Data, Identifying Goals and Objectives – Risk Profiling – Setting Expectations with Clients

UNIT – III

12 Hours

Analysis of Personal Financial Statements – Identifying Financial Issues and Financial Reports – Financial Planning Strategy Development

UNIT – IV

12 Hours

Construction of Financial Plan – Preparing Recommendations – Product Research – Product Selection

UNIT – V

12 Hours

Financial Plan Implementation – Monitoring of Financial Plan – Identifying Monitoring Parameters – Review of Plan – Handling Complaints –Grievance Redressal Mechanisms

Total No of Hours: 60

REFERENCE BOOKS:

1. Brandeburg, Matt The Financial Planning Workbook Coventry House Publishing



Department of Management Studies

HBBA18F21	LEGAL AND REGULATORY ASPECTS OF BUSINESS	<table border="1" style="margin: auto;"> <tr> <td style="padding: 5px;">L</td> <td style="padding: 5px;">T</td> <td style="padding: 5px;">P</td> <td style="padding: 5px;">C</td> </tr> <tr> <td style="text-align: center;">4</td> <td style="text-align: center;">0</td> <td style="text-align: center;">0</td> <td style="text-align: center;">4</td> </tr> </table>	L	T	P	C	4	0	0	4
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OBJECTIVES:

- To create the knowledge of Legal perspective and its practices to improve the business
- To Learn Legal insight will be established in the business practices according to the situation of changing Environment

UNIT I 12 Hours

COMMERCIAL LAW :-THE INDIAN CONTRACT ACT 1872:-Definition of contract, essentials elements and types of a contract, Formation of a contract,performance of contracts, breach of contract and its remedies, Quasi contracts - Contract Of Agency: Nature of agency, Creation and types of agents, Authority and liability of Agent and principal: Rights and duties of principal and agents, termination of agency.

UNIT II 12 Hours

COMPANY LAW :-Major principles – Nature and types of companies, Formation, Memorandum and Articles of Association, Prospectus, Power, duties and liabilities of Directors, winding up of companies, Corporate Governance.

UNIT III 12 Hours

INDUSTRIAL LAW :-An Overview of Factories Act - Payment of Wages Act - Payment of Bonus Act - Industrial Disputes Act.

UNIT IV 12 Hours

CONSUMER PROTECTION ACT
 Consumer Protection Act – Consumer rights, Procedures for Consumer grievances redressal, Types of consumer Redressal Machineries and Forums- Competition Act 2002

INTRODUCTION OF CYBER LAWS :- 12Hours

Cyber crimes, IT Act 2000 and 2002, Cyber Laws, Introduction of IPR – Copy rights, Trade marks, Patent Act.

Total No of Hours: 60

REFERENCE BOOKS

1. N. D. Kapoor, Elements of mercantile Law, Sultan Chand and Company, India, 2006.
2. P. K. Goel, Business Law for Managers, Biztantatara Publishers, India, 2008.
3. Dr. Vinod, K. Singhanian, Direct Taxes Planning and Management, 2008.
4. Richard Stim, Intellectual Property- Copy Rights, Trade Marks, and Patents, Cengage Learning, 2008



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HBBA18F22	CUSTOMER RELATIONSHIP MANAGEMENT	<table border="1" style="margin: auto; border-collapse: collapse;"> <tr> <td style="padding: 5px;">L</td> <td style="padding: 5px;">T</td> <td style="padding: 5px;">P</td> <td style="padding: 5px;">C</td> </tr> <tr> <td style="text-align: center; padding: 5px;">3</td> <td style="text-align: center; padding: 5px;">0</td> <td style="text-align: center; padding: 5px;">0</td> <td style="text-align: center; padding: 5px;">3</td> </tr> </table>	L	T	P	C	3	0	0	3
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OBJECTIVE:

- It is designed to provide a better understanding of customer relationship management and how it can affect the business
- It covers various aspects of CRM such as business process models and CRM, customer centric business, customer support issues during pre-order, point of order and post-order and case studies in CRM
- It deals with performance measurement and how CRM determines the effectiveness of business

UNIT I

9 Hours

CRM – Definition –Benefits- CRM and SCM- The Role of Internet on CRM- Importance of E-Mail, Internet, Extranet in Maintaining effective CRM.

UNIT II

9 Hours

Customer Loyalty- Customer Decision making process and Influence – Loyalty ladder Significance of Loyal Customer –Impact of lost Customers.

UNIT III

9 Hours

Creating Customer Data Base – Process and Approaches to Data Base Marketing – Applications of Data Base Marketing in Relationship Building.

UNIT IV

9 Hours

CRM and Marketing – Product or Brand Management –CRM and Sales- Field Sales, Tele Sales– Web based Sales CRM and Services – Field Service Customer Service – Professional Service Management.

UNIT V

9 Hours

BPO and International CRM – Call Centers – Scope of BPO – Emerging new Trends.

Total No of Hours: 45

REFERENCE BOOKS

1. R.K.Sugandhi, Customer Relationship Management, New Age International Publishers.
2. Jagadish N. Sheth and Arul Parvatiyar, Hand book of Relationship Marketing, Response books, 2002.
3. Daragh O'Reilly, Building Buyer Relationships, Macmillan India Limited 2001.
4. Knapp, A Guide to customer service Skill, Thomson Learning 2001.
5. Gosney, Customer Relationship Management Essentials, Prentice Hall, 2000
6. Ken Burnett, Key Customer Relationship Management, Pearson Education, 2001.



Department of Management Studies

HBBA18F23	BUSINESS ENVIRONMENT	<table border="1" style="margin: auto; border-collapse: collapse;"> <tr> <td style="padding: 2px;">L</td> <td style="padding: 2px;">T</td> <td style="padding: 2px;">P</td> <td style="padding: 2px;">C</td> </tr> <tr> <td style="text-align: center; padding: 2px;">3</td> <td style="text-align: center; padding: 2px;">0</td> <td style="text-align: center; padding: 2px;">0</td> <td style="text-align: center; padding: 2px;">3</td> </tr> </table>	L	T	P	C	3	0	0	3
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3	0	0	3							

OBJECTIVE:

To provide knowledge of the environment in which businesses operate, the economic operational and financial framework with particular application to the transaction of insurance business.

UNIT I

9 Hours

The concept of Business Environment - Nature and significance - Brief overview of political - Cultural - legal - economic and social environments and their impact on business and strategic decisions.

UNIT II

9 Hours

Political Environment - Government and Business relationship in India - Provisions of Indian constitution operating to business.

UNIT III

9 Hours

Social environment - Cultural heritage - social attitudes - impact of foreign culture – castes and communities - joint family systems - linguistic and religious groups - Types of social organization - social responsibilities of business.

UNIT IV

9 Hours

Economic Environment - Economic systems and their impact of business - Macro economic parameters like GDP - growth rate population - Urbanization - Fiscal deficit – Plan investment - Per capita income and their impact on business decisions - Five Year Planning.

UNIT V

9 Hours

Financial Environment - Financial System - Commercial banks - Financial Institutions – RBI Stock Exchange - IDBI - Non Banking Financial Companies NBFCs

Total No of Hours: 45

REFERENCE BOOKS

1. Sankaran. S - Business Environment
2. Francis Cherunilam - Business Environment
3. Aswathappa - Business Environment
4. Dasgupta&Sengupta - Government and Business in India
5. Srinivasan. K. - Productivity and Social Environment



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HBMG17G01	ENTREPRENEURIAL DEVELOPMENT	<table border="1" style="margin: auto;"> <tr> <td>L</td> <td>T</td> <td>P</td> <td>C</td> </tr> <tr> <td style="text-align: center;">4</td> <td style="text-align: center;">0</td> <td style="text-align: center;">0</td> <td style="text-align: center;">4</td> </tr> </table>	L	T	P	C	4	0	0	4
L	T	P	C							
4	0	0	4							

OBJECTIVES:

- To Impart The Basic Knowledge About Starting Up Of A New Business
- To Highlight Opportunities To Operate The Business By Adopting Latest Technology, Financial Assistance And Utilizing The Guidance From Various Sources

UNIT – I

12 Hours

Concept of Entrepreneurship – Meaning – Types – Qualities of an Entrepreneur – Classification of Entrepreneurs – Factors influencing Entrepreneurship – Functions of Entrepreneurs

UNIT – II

12 Hours

Entrepreneurial Development – Agencies – Commercial Banks – District Industries Centre – National Small Industries Corporation – Small Industries Development Organisation – Small Industries Service Institute. All India Financial Institutions – IDBI – IFCI – ICICI – IRDBI.

UNIT – III

12 Hours

Project Management - Business idea generation techniques – identification of Business Opportunities – Feasibility study – Marketing, Finance, Technology & Legal Formalities- Preparation of Project Report Tools of Appraisal.

UNIT – IV

12 Hours

Entrepreneurial Development programmes (EDP) – their role, relevance, and achievements – Role of Government in organizing EDPs – critical evaluation

UNIT– V

12 Hours

Economic development and entrepreneurial growth
 Role of Entrepreneur in economic growth – Strategic approaches in the changing economic scenario for small scale Entrepreneurs – Networking – Niche play, Geographic Concentration, Franchising/dealership – Development of Women Entrepreneurship.

Total No of Hours: 60

REFERENCE BOOKS:

1. Srinivasan N.P. – Entrepreneurial Development
2. Saravanavel – Entrepreneurial Development
3. Vasant Desai – Project Management
4. Jayashree Suresh – Entrepreneurial Development
5. Holt – Entrepreneurship – New Venture Creation