



SHARDA
UNIVERSITY
Beyond Boundaries



**SHARDA SCHOOL OF
BUSINESS STUDIES**



COURSE

**Strategic Investment
Foundations
for Future Managers
(NVAC202)**

VALUE ADDED
COURSE BROCHURE-30 HRS
2024-25

ABOUT THE UNIVERSITY

Sharda University is a leading Educational institution based out of Greater Noida, Delhi NCR. A venture of the renowned Sharda Group of Institutions (SGI), The University has established itself as a high-quality education provider with a prime focus on holistic learning and imbibing competitive abilities in students.

ABOUT SCHOOL

Sharda School of Business Studies believes in preparing students to approach business obstacles and solve them the way established corporations do. Learning happens both inside and outside the classroom; hence, technology plays a big part in the core culture, and so do global exposure, project management, critical reasoning, and business communications skills.

ABOUT COURSE

NVAC202 Strategic Investment Foundations for Future Managers is a comprehensive course designed to equip aspiring managers with the essential knowledge and skills needed to make informed investment decisions in a dynamic business environment. The course focuses on the principles of strategic investment, including asset allocation, portfolio management, risk assessment, and financial analysis. By bridging theoretical concepts with practical applications, it enables students to evaluate investment opportunities critically, understand market dynamics, and develop strategies that align with long-term business objectives. Additionally, the course introduces contemporary investment tools and technologies, ensuring students are prepared to navigate modern financial landscapes effectively.

With an emphasis on future-oriented decision-making, the course covers emerging trends in investment, such as sustainable investing, alternative asset classes, and the impact of economic and geopolitical factors on global markets. It includes case studies, simulations, and interactive discussions to help students develop a holistic understanding of investment strategies in real-world scenarios. By the end of the course, participants will possess the strategic mindset and analytical expertise necessary to create value, manage financial resources efficiently, and contribute to the long-term growth of their organizations in a competitive global economy.

COURSE SCHEDULE

Week	Content	Details of Topic Covered	Duration Hrs.
1	Foundations of Investment and Financial Markets	Investment Fundamentals and The Investment Process.	3
2	Overview of Financial Markets and Regulatory Bodies	SEBI, RBI, IRDA, and the Role of Regulations in Maintaining Market Integrity	3
3	Risk and Return Management	Compounding, Inflation, and Real Returns: Understanding the Power of Time and Inflation Impact on Investments	3
4	Types of Risk and Returns	Types of Returns: Nominal, Real, and Expected Returns for Informed Financial Planning Types of Risk: Systematic vs. Unsystematic Risk, Beta, and Portfolio Diversification Techniques	3
5	Negotiable Investment Alternatives – Direct Investing	Securities in Direct Investment, Primary and Secondary Markets, IPOs, and Equity Analysis	3
6	Stock Classifications and Market Dynamics	Investment Philosophies, Equity vs. Debt, Growth vs. Value Investing, Buying, Selling, and Tax Implications of Stock Investments	3
7	Investment Alternatives - Negotiable (Indirect Investing)	Mutual Funds Basics: Types of Mutual Funds, Key Benefits, and Drawbacks	3
8	Mutual Fund Strategies	Equity and Debt Funds, Active vs. Passive Investment Approaches Equity and Debt Funds, Active vs. Passive Investment approaches Evaluating Fund Performance and Tax Implications on Mutual Funds	3
9	Non-Negotiable and Alternative Investment Options	Postal and NBFC Investments	3
10	Protection-Oriented Investment Products	Life and Health Insurance, Tax Implications, and Financial Planning with Insurance	3

PROFILES

Prof. (Dr.) Arun Kumar

IIM Indore Alumni and a highly accomplished professional with over 39 years chronicle of success and a track record of working with reputed & well-known Government owned Banks (including State Bank of Bikaner & Jaipur, Punjab & Sind Bank & UCO Bank) and Best International Rating Agency & Risk Consultant (Dun & Bradstreet Dubai) and associated as Consultant (Deputed to Lagos, Nigeria) with Dun & Bradstreet Dubai and spearheading the implementation of Basel-II/III, formulation of ICAAP and other credit & operational risk consultancy at Nigeria. Breadth of experience contribution in e-Governance, Business Consultancy & Evaluation, Basel II & III, Credit Regulatory Reporting, Audit & Inspection, Risk Management, Budgeting/ Forecasting, Relationship Management and Banking Operations. Proficient in evaluating internal control systems / procedures, preparing audit reports with a view to highlight the shortcomings and implementing necessary recommendations.

Dr. Santosh Singhal

Dr. Santosh Kumar is working as an associate professor at the Sharda School of Business Studies, Sharda University. He is MBA (finance), M.com, M.A. (eco.), ICWA (I), and Ph.D. with a vast experience of 20 years in teaching and research. He has published many research papers in national and international journals of high repute. He has authored 2 books on financial

accounting. He is a certified derivative expert of NISM and a resource person of the Indian Institute of Corporate Affairs. He has delivered a number of guest talks and workshops on the functioning of the stock market. He has stock trading experience of around 10 years in equity and derivatives markets.

Dr. Saman Khan

Dr. Saman Khan joined Sharda University in the January of 2025. She specializes in Human Resource Management. After completing her MBA her professional journey started in 2006 as an Assistant Professor at Shri Jai Narain PG College, Affiliated to the University of Lucknow. Her leadership, rapport with colleagues and organizational abilities made her affable member of the college. While performing her duties as a dedicated teacher, her love for education helped her to earn Masters' degrees in Commerce, Economics. Her PhD work deals with the issue of comparison of Management Development Programmes in Public and Private Sector in India.

An avid reader and a bibliophile, she also likes to spend her time with students trying to shape their minds and bring out novel ideas. She has written several research papers in journals of national and international repute, attended several workshops, organized seminars and conferences during her academic journey. She is member of several prestigious bodies like AIMA, ICA, IEA and IALSE.

Besides teaching and research, Dr. Khan managed the working of IGNOU Study Centre 2701 as Assistant Coordinator.

Anup Kumar Srivastava

Anup Kumar Srivastava has joined Sharda University – School of Business Studies as Assistant Professor in Finance Stream. He is pursuing Ph. D. in Finance from Lovely Professional University. He did his MBA in Finance from ICFAI Business School Hyderabad in 2009 & worked with Religare and other organization before switching to the educational services. Before joining Sharda University, he was an Assistant Professor at Lovely Professional University, Jalandhar in the Mittal School of Business for 5+ years and having total experience in industry and academics is more than 16 years.

School: SSBS		Batch : 2024-27	
Programme: BBA		Current Academic Year: 2024-25	
Branch:		Semester: II	
1. Course Code	NVAC202		
2. Course Title	Strategic Investment Foundations for Future Managers		
3. Credits	Audit Course		
4. Contact Hours (L-T-P)	30 Hours		
Course Type	Value added course		
5. Course Objective	<p>1. To acquaint students with fundamental investment concepts and the importance of developing sound investment habits for financial security.</p> <p>2. To emphasize the role of regulatory bodies and the importance of compliance in investment decisions.</p> <p>3. To highlight the necessity of understanding risk and return factors, including inflation, to make informed investment choices.</p> <p>4. To equip students with skills for evaluating portfolio performance and aligning it with personal or organizational financial goals.</p>		
6. Course Outcomes	<p>CO1: The student will be able to understand the fundamental concepts, objectives, and ethical considerations of investment.</p> <p>CO2: The student will be able to identify and understand the roles of regulatory bodies, such as SEBI, RBI, and IRDA, in the investment landscape.</p> <p>CO3: The student will be able to analyze the effects of compounding, inflation, and risk factors on investment decisions.</p> <p>CO4: The student will be able to differentiate and evaluate various Indian investment avenues, including direct and indirect investment options.</p> <p>CO5: The student will be able to assess portfolio performance, manage risk, and apply investment strategies for optimal returns.</p> <p>CO6: The student will be able to analyze the tax implications on different investment products and incorporate tax-efficient strategies in financial planning.</p>		
7. Course Description	<p>This course will provide essential knowledge and insights into the importance of developing investment habits, particularly focusing on the critical decisions made by non-specialist yet rational individuals. You will explore various investment strategies and learn how to build a well-balanced portfolio tailored to your financial goals and risk tolerance. Through engaging video lectures and practical examples, this course will enhance your analytical skills and decision-making abilities in the investment landscape, preparing you to make informed financial choices confidently and responsibly.</p>		
8. Outline syllabus			CO Mapping
Unit 1	Foundations of Investment and Financial Markets		
A	Investment Fundamentals: Concept, Objectives, Savings vs. Investments, Speculation, and Ethical Investing		CO1
B	The Investment Process: Key Stages, Smart Investing Strategies, and Responsible Decision-Making		CO1
C	Overview of Financial Markets and Regulatory Bodies: SEBI, RBI, IRDA, and the Role of Regulations in Maintaining Market Integrity		CO2
Unit 2	Risk and Return Management		
A	Compounding, Inflation, and Real Returns: Understanding the Power of Time and Inflation Impact on Investments		CO3
B	Types of Returns: Nominal, Real, and Expected Returns for Informed Financial Planning		CO3
C	Types of Risk: Systematic vs. Unsystematic Risk, Beta, and Portfolio Diversification Techniques		CO3
Unit 3	Negotiable Investment Alternatives – Direct Investing		
A	Securities in Direct Investment: Primary and Secondary Markets, IPOs, and Equity Analysis		CO4
B	Stock Classifications and Market Dynamics: Investment Philosophies, Equity vs. Debt, Growth vs. Value Investing		CO4
C	Stock Market Mechanics: Buying, Selling, and Tax Implications of Stock Investments		CO5,CO6
Unit 4	Investment Alternatives - Negotiable (Indirect Investing)		
A	Mutual Funds Basics: Types of Mutual Funds, Key Benefits, and Drawbacks		CO4
B	Mutual Fund Strategies: Equity and Debt Funds, Active vs. Passive Investment Approaches		CO4
C	Evaluating Fund Performance and Tax Implications on Mutual Funds		CO5,CO6
Unit 5	Non-Negotiable and Alternative Investment Options		
A	Banking and Fixed Income Investments: Savings Accounts, Fixed Deposits, Public Provident Fund (PPF)		CO4, CO5, CO6
B	Postal and NBFC Investments: Post Office Deposits, National Savings Certificates (NSC), NBFC Fixed Deposits		CO4, CO5, CO6
C	Protection-Oriented Investment Products: Life and Health Insurance, Tax Implications, and Financial Planning with Insurance		CO4, CO5, CO6
Mode of examination	Assignments/Quizzes		