



SHARDA
UNIVERSITY
Beyond Boundaries



**SHARDA SCHOOL OF
BUSINESS STUDIES**



— COURSE —

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

VALUE ADDED
COURSE BROCHURE-30 HRS
2025-26

Vision and Mission of the School

Vision of the School

To become a world class institution imparting education based on values, fostering culture of research, innovation and entrepreneurial spirit and exhibiting professional excellence for better and sustainable society.

Mission of the School

M1. Building conducive learning ecosystem

M2. Creating socially responsible future business leaders and entrepreneurs

M3. Imparting cutting-edge application based curriculum

M4. Boosting industry-academia connect

Course Articulation Matrix

P0s C0s	P01	P02	P03	P04	P05	P06	PS0(1)	PS0(2)	PS0 (3)
C01	1	1	-	-	-	-	2	2	3
C02	-	-	-	-	1	-	1	1	1
C03	2	-	2	1	3	-	-	1	-
C04	2	1	3	2	2	-	-	-	-
C05	2	2	3	2	1	-	1	-	1
C06	2	1	3	2	2	-	2	-	-
Average	1.80	1.25	2.75	1.75	1.80		1.50	1.33	1.67

1-Slight (Low)

2-Moderate (Medium)

3-Substantial (High)

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

The 'Strategic Investment Foundations for Future Managers' (NVAC202) is a value-added 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

Dr Y.P. Singh:

Dr Y.P. Singh, Professor (Finance) at Sharda University, Greater Noida, is a Financial Expert, Corporate Trainer and Researcher with Several research papers and a few books to his credit. He has 25+ years of professional experience in the field of teaching, training, Research and consultancy. Areas of interest include Personal Financial Planning, Data Analysis through SPSS, AMOS & SMART-PLS, Accounting & TALLY, Feasibility Analysis & MS-Project, Financial Market & Products, and Security Analysis & Portfolio Management including Derivatives Market.

Dr Santosh Kumar:

Dr. Santosh Kumar is working as an associate professor of finance 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 area. His one book is under publication. 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 trading experience of around 10 years in equity and derivatives markets. He has chaired the technical sessions of so many national and international conferences.

Dr. Ankur Agrawal:

Dr. Ankur Agrawal is an Academician, Consultant, Corporate Trainer and Researcher, having over 20 years of experience. As a part of his teaching portfolio, he specializes in the areas of Corporate Finance, Security Analysis, Investment Banking, Green finance and Entrepreneurial Finance. He has conducted many Training Programs for National Fertilizer Limited (NFL) Maha Ratan PSU, NBCC (Navratna PSU) & many Software & Health care enterprises. His research areas include Capita Structure Decision Making; Multi Criteria Decision Making for Security Valuation. He has authored a few books and a good number of research papers in Journals of repute.

Dr. Anup Kumar Srivastava: Dr. Anup Kumar Srivastava is Assistant Professor in Finance Stream at Sharda University – School of Business Studies. He has 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.

Dr. Mohammed Rashid:

Dr. Mohammed Rashid is Ph.D. in Behavioral Finance from Aligarh Muslim University. His research area is finance, accounting, Fintech which includes investigating the psychological and economic factors influencing decision-making. He has published papers in Scopus, ABDC, WOS and ABS Indexing Journals. He also holds Certification Course on Financial Modelling and Company Valuation and Advanced excel.

Prof. Shrikant Vashishtha:

Prof. Shrikant Vashishtha is currently working as an Assistant Professor in Sharda School of business studies. He carries more than 6 -years' experience as a Faculty in Accounting & Finance.

School: SSBS		Batch : 2025-28 Current Academic Year: 2025-26 Semester: II
Programme: BBA/ B.Com		
Branch:		
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	1. To acquaint students with fundamental investment concepts and the importance of developing sound investment habits for financial security. 2. To emphasize the role of regulatory bodies and the importance of compliance in investment decisions. 3. To highlight the necessity of understanding risk and return factors, including inflation, to make informed investment choices. 4. To equip students with skills for evaluating portfolio performance and aligning it with personal or organizational financial goals.	
6. Course Outcomes	CO1: The student will be able to understand the fundamental concepts, objectives, and ethical considerations of investment. 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. CO3: The student will be able to analyze the effects of compounding, inflation, and risk factors on investment decisions. CO4: The student will be able to differentiate and evaluate various Indian investment avenues, including direct and indirect investment options. CO5: The student will be able to assess portfolio performance, manage risk, and apply investment strategies for optimal returns. CO6: The student will be able to analyze the tax implications on different investment products and incorporate tax-efficient strategies in financial planning.	
7. Course Description	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.	
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	