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FIFTH SEMESTER (CUFYUGP) DEGREE EXAMINATION NOVEMBER 2026

MANAGEMENT STUDIES

BBA5EJ301(1) SECURITY ANALYSIS AND PORTFOLIO MANAGEMENT

2024 Admission onwards

Maximum Time: 2 Hours | **Maximum Marks: 70**

Section A

All Questions can be answered. Each Question carries 3 marks (Ceiling: 24 Marks)

1	Define Investment.
2	An investment gives ₹6,000 income on an investment of ₹60,000. Calculate the rate of return.
3	An investor buys a share at ₹500 and sells it at ₹550. During the holding period, he receives a dividend of ₹20. Calculate total return.
4	What do you mean by Fundamental Analysis
5	What is Markowitz Portfolio Theory?
6	Define Portfolio Management?
7	Mention any four economic indicators.
8	What is Strategic Asset Allocation?
9	What is CAPM?
10	A company earns ₹5,00,000 and has 1,00,000 equity shares. Calculate EPS.

Section B

All Questions can be answered. Each Question carries 6 marks (Ceiling: 36 Marks)

11	Briefly explain the objectives of investment.
12	Define Portfolio Monitoring.
13	Discuss the Charting Tools used in Technical Analysis.
14	A portfolio consists of three securities: Security — Investment Weight — Expected Return A — 40% — 15% B — 35% — 10% C — 25% — 8% Calculate expected portfolio return.
15	Explain Asset Allocation Strategies.
16	Discuss Capital Market Line (CML).

17	Compare Two Portfolios Using Sharpe Ratio Particulars — Portfolio A — Portfolio B Return — 14% — 16% Risk-free rate — 6% — 6% Standard Deviation — 8% — 12% Calculate Sharpe Ratio and identify the better portfolio.
18	Discuss the three forms of Market Efficiency.
	Section C
	Answer any ONE. Each Question carries 10 marks (1x10=10 Marks)
19	What is Industry Analysis? Explain the different stages of the Industry Life Cycle.
20	Explain the various types of Financial Investments and their characteristics.