SL No of QP : 3534
Unique Paper Code: 2924002009
Name of the Paper: Wealth Management
Name of the Course: Generic Elective, BMS (Finance & Business Economics)
Semester: III
Duration: 3 Hours
Maximum Marks: 90

Instructions for the Candidates

- Answer any **five** questions.
- All questions carry equal marks.
- Use of Simple Calculator is allowed.

Question 1:

a. Discuss investment environment in detail.
b. Explain important steps of investment decision process.

(9+9)

Question 2: Suppose security returns and associated market returns are given as follows:

Security Return (%)	5	12	15	8	4
Market Return (%)	8	10	19	9	22

a. Calculate average returns and total risk on security and market, separately.
b. Calculate beta (β) of security using the above information.

(9+9)

Question 3

a. Discuss the three approaches (Fundamental Analysis, Technical Analysis, and Efficient Market Hypothesis) in detail.
b. Explain the EIC Framework of Fundamental Analysis at length.

(9+9)

Question 4

a. Using the concepts of indifference curves, discuss different types of investors.
b. Contrast direct investing and indirect investing.

(9+9)

Queston 5

a. Discuss the roles of risk and return in Asset Allocation Pyramid.

b. Discuss the estate planning documents which can be used by someone who wants his or her property to be transferred after death.

(9+9)

Question 6

a. Discuss the Efficient Frontier of Portfolio Analysis using suitable graph.

b. Discuss the Modern Portfolio Theories in brief and also calculate the number of correlations required for portfolio optimization using modern portfolio theory for 100 assets.

(9+9)

Question 7: Write short notes on any three of the following:

a. Risk Return Trade Off

b. Active and Passive Approaches of Investing

c. Systematic and Unsystematic Risks

d. Three Levels or Forms of Market Efficiency

(6+6+6)