

ELECTIVE III - TAX AND INVESTMENT PLANNING

COURSE CODE: 17UCOM320	YEAR / SEMESTER: III / V	MAXIMUM MARKS: 100
COURSE TYPE: THEORY	CREDITS: 5	TOTAL TEACHING HOURS: 75

GENERAL OBJECTIVE:

To provide an overview of fundamentals of Investment and facilitate making a personal Investment Plan

COURSE OBJECTIVES (Co):

Co No.	Course Objective
Co1	To deliver an understanding of types of Asset Classes
Co2	To apply and analyse the steps in Investment Decision Making
Co3	Investment Regulatory and facilitating agencies
Co4	To give an understanding about Income Tax fundamentals
Co5	To apply the basic implications of Insurance , Retirement and Estate Planning on a Personal Investment Plan

UNIT I

Investment Fundamentals

Investment - concept, Asset classes-financial asset, physical assets, Investment alternatives – Shares, Bonds, Deposits, Mutual Funds - money market products – Derivatives.

Risk - return analysis, portfolio concept and diversification of risk.

(15 hrs)

UNIT II

Investment decision making

Investment decision making process - Introduction to fundamental and technical analysis – economic analysis, industry analysis, company analysis

(15 hrs)

UNIT III

Regulation and procedural aspects

Regulation of the Indian financial system – Role of RBI, SEBI, other agencies- Credit rating- Investment banking, depository, depository participants -Dematerialization and Rematerialization - investment execution process (15 hrs)

UNIT IV

Tax Computation and Planning

Income-tax – Principles- components, computation for Individuals- Heads of Income. Gross Total Income – Permissible deductions and allowances – Slab rates - Online filing of returns and payments - Tax planning Techniques

(15 hrs)

UNIT V

Retirement Planning

Development of retirement plan – Retirement schemes - Employees Provident Fund (EPF), Public Provident Fund (PPF), Superannuation Fund, Gratuity, Other Pension Plans.

Insurance Planning

Risk management and insurance decision in personal financial planning, Various Insurance Policies - General Insurance, Life Insurance, Motor Insurance, Medical Insurance.

Estate management

Will – Meaning, characteristics, types, legal constraints and requirements – other modes of estate transfer.

(15 hrs)

REFERENCE BOOKS:

- Indian Institute of Banking & Finance(2017)–Investment Planning, Tax Planning and Estate Planning, Taxmann Publication
- Indian Institute of Banking & Finance(2017)- Risk Analysis, Insurance and Retirement planning, Taxmann Publication
- Dr.Singhanian .K. Vinod&Singhanian Monica(2018-19) Income tax - Students' Guide to Income Tax Including GST 58thEdition, Taxmann Publication

E – RESOURCES:

- What is Merchant Banking: <https://www.youtube.com/watch?v=GEI068jF6II>
- 3 Golden rules of saving money in 2021: <https://www.youtube.com/watch?v=Z1bU3dE7Rdc>
- What is Mutual Funds. <https://www.youtube.com/watch?v=PbldLCsspgE>
- Stock market concept. <https://www.youtube.com/watch?v=ODBJz87boBQ>
- Is whole life insurance a scam: <https://www.youtube.com/watch?v=AgBhy8iXjpl>
- Reality of money back plans: https://www.youtube.com/watch?v=GqYfi1h4_Yg.

COURSE OUTCOMES:

On completion of the course the student will be able to

CO No.	COURSE OUTCOME	PSOs ADDRESSED	COGNITIVE LEVEL
CO1	Explain investment fundamentals like Asset Classes, Risk , Return and Portfolio concepts	1	E
CO2	Elaborate on the investment decision process	1	C
CO3	Examine the regulatory role of various agencies in the Indian financial system	1	An
CO4	Outline the process of tax computation and apply the various tax planning techniques available to individuals in India	1,2	Ap , E
CO5	Evaluate various techniques for retirement planning, risk management through insurance and estate management	1,2	E

R- Remember ; U- Understand ; Ap - Apply ; An - Analyse ; E- Evaluate ; C - Create

ELECTIVE III - BUSINESS ANALYTICS USING PYTHON

COURSE CODE:	YEAR/SEMESTER: III/V	MAXIMUM MARKS: 100	THEORY: 55 Hours
COURSE TYPE: THEORY & PRACTICAL	CREDITS: 5	TOTAL TEACHING HOURS: 75	PRACTICAL: 20 Hours

GENERAL OBJECTIVE:

To provide an understanding of the fundamental principles of analytics and analyse real datasets using python visualization techniques.

COURSE OBJECTIVES (Co):

Co. No.	Course Objective
Co1:	To introduce the basic concepts of Data Analysis and its process
Co2:	To present the basic features of mining and preparing data
Co3:	To explain the various packages and libraries in python
Co4:	To demonstrate the fundamentals of the pandas and visualize datasets
Co5:	To develop skills required to analyse data in various domains

UNIT I

Introduction to Analytics

Introduction: Data Analysis–Domains of data analyst – Understanding nature of Data – Data Analysis Process – Quantitative and Qualitative analysis – python and data analysis.

(15Hrs)

UNIT II

Data Mining and Data Preparation

Data Mining: Definition – representation – mining process – analysis methodologies – data validation – data transformation – data reduction.

(15Hrs)

UNIT III

Introduction to Python and Numpy

Features of Python –IDEs for python – Scipy - How to Run Python – Identifiers- Reserved Keywords- Variables - Comments in Python - Indentation in Python - Input, Output and Import - Operators. Data Types - Control Statements- for, while, if. Numpy: Installation - Creating Arrays -Basic operations – arithmetic – aggregate -indexing.

(15Hrs)

UNIT IV

Pandas and Data visualization with Matplotlib

Introduction – Series -frames – reading and writing csv using pandas. Matplotlib: Installation - lines – bar charts – pie charts – histograms. (15Hrs)

UNIT V

Applications

Relational marketing – Salesforce management – Business case studies. (15 Hrs)

TEXT BOOKS

- Fabio Nelli, Python for Data Analytics With Pandas, NumPy and Matplotlib, Second Edition.
- Carlo-Vercellis, Business Intelligence Data Mining and Optimization for Decision-Making, First Edition.

REFERENCE BOOKS

- Dr. Jeeva Jose (2018) ,Taming Python By Programming, Khanna Publishers.
- John V Guttag (2013), Introduction to Computation and Programming Using Python, Revised and expanded Edition, MIT Press.
- Kenneth A. Lambert (2012), Fundamentals of Python: First Programs, Cengage Learning.

E RESOURCES

Web Links

- <https://www.w3schools.com/datascience/>
- <https://www.simplilearn.com/data-science-vs-big-data-vs-data-analytics-article>
- <https://careerfoundry.com/en/blog/data-analytics/what-is-data-analytics/>
- <https://www.tutorialspoint.com/python/index.htm>
- <https://www.geeksforgeeks.org/python-programming-language/>
- <https://www.w3schools.com/python/>

Video Links

- <https://www.youtube.com/watch?v=yZvFH7B6gKI>
- <https://www.youtube.com/watch?v=YZf5q-ICf8Y>
- <https://www.youtube.com/watch?v=u2zsY-2uZiE>
- <https://www.youtube.com/watch?v=ua-CiDNNj30>

COURSE OUTCOMES:

On completion of this course the student will be able to

CO No:	COURSE OUTCOME	PSOs ADDRESSED	COGNITIVE LEVEL
CO1:	Understand & Evaluate the concepts of data analysis	2	E
CO2:	Analyze data mining, data validation and data reduction	2,4	E
CO3:	Examine the features of Python programming basics	2	C
CO4:	Execute basic visualization programs using Python	1,3	C
CO5:	Discuss various case studies and execute programs relating to various functional areas of management	1,2	C

R- Remember; U- Understand; Ap - Apply; An - Analyse; E- Evaluate; C –Create