

COURSE SYLLABUS**Semester II****2.6 SEC**

Course Title	Investment Planning
Course Credits	2
Course Outcomes	After going through the course, learners will be able to
	• Familiarity with different aspects of financial literacy such as savings, investment, taxation, and insurance • Understand the relevance and process of financial planning • Promote financial well-being
Module 1 (Credit 1) Investment Planning and Management	
Learning Outcomes	After learning the module, learners will be able to
	• Analyse banking and insurance products • Personal tax planning
Content Outline	1.1 Investment opportunity and financial products 1.2 Insurance Planning: Life and non-life including medical insurance schemes
Module 2 (Credit 1) Personal Tax	
Learning Outcomes	After learning the module, learners will be able to
	• Analyze banking and insurance products • Personal tax planning
Content Outline	2.1 Introduction to basic Tax Structure in India for personal taxation 2.2 Aspects of Personal tax planning 2.3 Exemptions and deductions for individuals 2.4 e-filing (<i>Note</i> : Some of the theoretical concepts would be dealt with during practice hours)

Assignments/Activities towards Comprehensive Continuous Evaluation (CCE)-**Internal: 50 marks**

Sr. No	Assignments/Activities
1	Written Test/ Assignment / Project Report/ Quiz/Debate
2	Group Discussion / Case Study
3	PPT Presentations/Seminars/Workshop/ Any other innovative methods
	Total – 50 Marks

External: NIL

Reference Books:

- Introduction to Financial Planning (4th Edition 2017)- Indian Institute of Banking & Finance.
- Sinha, Madhu. Financial Planning: A Ready Reckoner July 2017, McGraw Hill.
- Halan, Monika, Lets Talk Money: You've Worked Hard for It, Now Make It Work for You, July 2018 Harper Business.
- Pandit, Amar The Only Financial Planning Book that You Will Ever Need, Network 18 Publications Ltd.