

Enroll No

K.E.Society's  
**Rajarambapu Institute of Technology, Rajaramnagar**  
(An Empowered Autonomous Institute, affiliated to SUK)  
**Unit Test -I (2025-26)**  
S.Y. M.B.A. IEV

Q.P. Code
UT 2974

**Course Code:** MIF2032      **Course Name:** Investment Analysis & Portfolio Management

Day & Date: Tuesday, 12/8/2025

Time: 11.45am-12.45pm

Max Marks- 25

- Instructions:**
- 1) All questions are compulsory.
  - 2) Figures in rounded ( ) brackets within the question, indicate the scheme of marking for respective part of the question, whereas, figures in the first right column indicate total marks for that whole question.
  - 3) CO is the index number of the Course Outcome statement.
  - 4) The Bloom's taxonomy level (BL) for 1,2,3,4,5 and 6 is remember, understand, apply, analyze, evaluate and create respectively.
  - 5) Assume suitable data if necessary.
  - 6) Use of non-programmable calculators is allowed

	Marks	BT Level	COs
Q.1 'Securities market indices used to give investors and financial analysts an indication of the overall market performance' justify  Or	8	4	1
Q.1 "Securities markets channelize the widespread and diverse savings of millions of small investors into long term wealth creation." Explain.	8	4	1
Q.2 Describe how investment is different from saving also discuss any four types of investment.	9	2	2
Q.3 Mr. Rajesh, aged 40, earns ₹15 lakh annually and wants to invest ₹10 lakh for his child's higher education in 12 years. He has moderate risk tolerance and prefers a mix of stable income and growth opportunities. A financial planner suggests that asset allocation is the most important factor in determining investment success. The planner considers equity mutual funds, government bonds, real estate, and gold as possible asset classes.			
Questions:			
a) Explain why asset allocation is important for Mr. Rajesh's investment goal, referring to the factors affecting allocation decisions.	4	2	1
b) Apply the concept of asset allocation to prepare a suitable investment mix for Mr. Rajesh, justifying each choice.	4	3	2

