



RAMA UNIVERSITY

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FACULTY OF COMMERCE AND MANAGEMENT

COURSE: BBA (DM)

SUBJECT: SECURITY AND PORTFOLIO MANAGEMENT

SUBJECT CODE: BBA (DM) 602

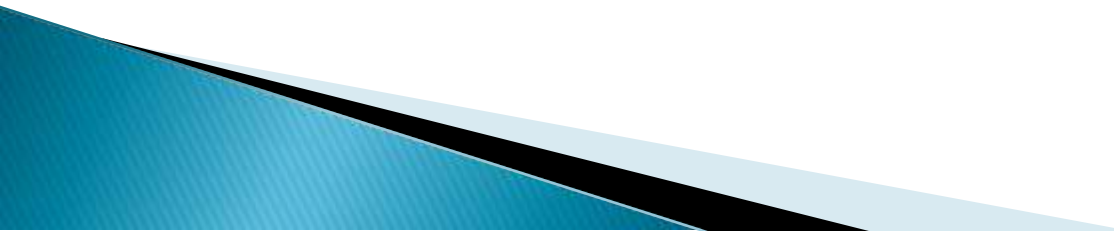
LECTURE: 14

NAME OF FACULTY: DR. NITIN GUPTA

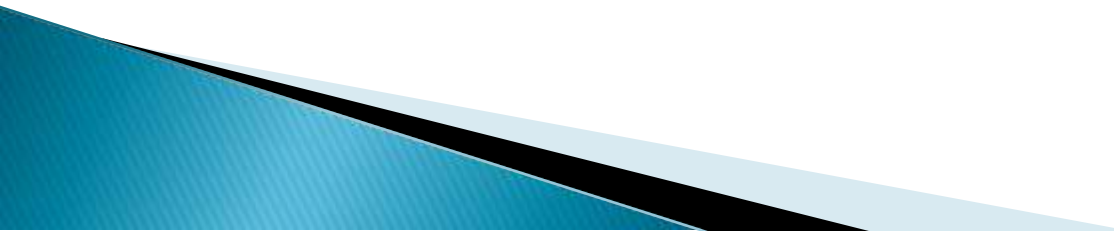
PORTFOLIO MANAGEMENT

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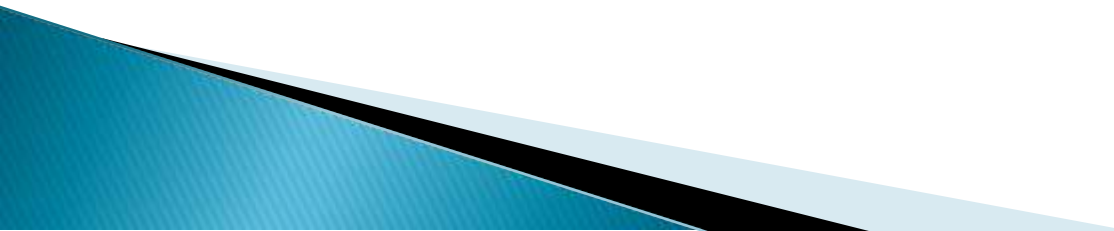
What is Portfolio

1. **Portfolio** is a group of financial assets such as shares, stocks, bonds, debt instruments, mutual funds, cash equivalents, etc. A portfolio is planned to stabilize the risk of non-performance of various pools of investment.
- Portfolio refers to invest in a group of securities rather to invest in a single security.
 - “Don’t Put all your eggs in one basket”
 - Portfolio help in reducing risk without sacrificing return.
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What is Management

- Management is the organization and coordination of the activities of an enterprise in accordance with well-defined policies and in achievement of its pre-defined objectives.
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Portfolio Management

- Portfolio Management is the process of creation and maintenance of investment portfolio.
 - Portfolio management is a complex process which tries to make investment activity more rewarding and less risky.
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Phases of Portfolio Management

Portfolio management is a process of many activities that aimed to optimizing the investment. Five phases can be identified in the process:

1. Security Analysis.
2. Portfolio Analysis.
3. Portfolio Selection.
4. Portfolio revision.
5. Portfolio evaluation.

Each phase is essential and the success of each phase is depend on the efficiency in carrying out each phase.

