



LOYOLA COLLEGE (AUTONOMOUS), CHENNAI – 600 034

P.G. DEGREE EXAMINATION –CROSS DISCIPLINARY

SECOND SEMESTER – APRIL 2023

PCO2CD01 – WEALTH MANAGEMENT

Date: 12-05-2023

Dept. No.

Max. : 100 Marks

Time: 01:00 PM - 04:00 PM

SECTION A – K1 (CO1)

Answer ALL the questions

(5 x 1 = 5)

1. **Answer the following**

- a) Time Value of Money
- b) Financial Planning
- c) Money Market
- d) Insurance
- e) Direct Tax

SECTION A – K2 (CO1)

Answer ALL the questions

(5 x 1 = 5)

2. **True or False**

- a) An investor can never make a loss with a SIP.
- b) Financial planning is the preparation of a financial blueprint for an organization's future operations.
- c) Capital markets deal in Long term securities
- d) Shares are issued for the first time in the primary market.
- e) Equity shares represent ownership capital

SECTION B – K3 (CO2)

Answer any THREE of the following in 300 words

(3 x 10 = 30)

- 3. What are the various types of Financial plan?
- 4. Mr. X invests Rs.500, Rs.1,000 and Rs.2,000 at the end of each year. Calculate the compound value at the end of 3 years compounded annually when interest is charged at 10% p.a.
- 5. Explain in detail the asset allocation based on risk profile.
- 6. Execute the 4 R's in Tax planning.
- 7. Identify the various types of risk in Investments.

SECTION C – K4 (CO3)

Answer any TWO of the following in 500 words

(2 x 12.5 = 25)

- 8. Examine the Indian financial market in detail.
- 9. Describe the Financial planning process.
- 10. Give an elaborate account of the various components of risk profile.
- 11. Demonstrate in detail Diversification and Hedging.

SECTION D – K5 (CO4)

Answer any ONE of the following in 750 words (1 x 15 = 15)

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| 12. | Differentiate between Direct tax and Indirect tax. |
| 13. | Critically analyze the various systematic approach to investing. |

SECTION E – K6 (CO5)

Answer any ONE of the following in 1000 words (1 x 20 = 20)

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| 14. | Investigate in detail Risk profiling and the various types of Asset allocation. |
| 15. | Formulate the various Financial products with examples. |

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