



LOYOLA COLLEGE (AUTONOMOUS) CHENNAI – 600 034

P.G. DEGREE EXAMINATION –CROSS DISCIPLINARY

SECOND SEMESTER – APRIL 2025

PCO2CD01 – WEALTH MANAGEMENT



Date: 05-05-2025

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

- What is underwriting?
- Write a short note on Certificate of Deposit.
- What do you mean by inside trading?
- Write a short note on ROI.
- What is the slab rate for income tax?

SECTION A – K2 (CO1)

Answer ALL the questions (5 x 1 = 5)

2 Fill in the blanks

- The Nifty consists of -----.
- is the market where the existing securities of companies are traded.
- Money market deals with-----
- Stock broker means a member of a -----.
- Assessment Year is the period of 12 month commencing on 1st day of ----- every year

SECTION B – K3 (CO2)

Answer any THREE of the following in 100 words each. (3 x 10 = 30)

- Differentiate between primary and secondary market.
- List out the steps involved in investment planning.
- Who are the stockbrokers? Explain their role in securities market operations.
- How are mutual funds schemes classified? Explain.
- Explain the concept of Income as per IT act.

SECTION C – K4 (CO3)

Answer any TWO of the following in 200 words each. (2 x 12.5 = 25)

- List out the various stages of Wealth cycle.
- Elaborate the functions and features of insurance.
- Distinguish between systematic and unsystematic risks
- Mr. Pete considers buying a house. Currently, he rents a place for ₹ 1,000 a month. The current monthly interest rate on mortgages is 0.5%. His planning period is 20 years. If he doesn't want to increase his housing costs, what amount of mortgage is available for his purchase?

SECTION D – K5 (CO4)

	Answer any ONE of the following in 500 words	(1 x 15 = 15)
12	Elucidate the various alternative available to investors for investment.	
13	Explain the risk and return relationship among the securities	

SECTION E – K6 (CO5)

	Answer any ONE of the following in 1000 words	(1 x 20 = 20)
14	Elaborate the challenges of wealth management in India	
15	Discuss the various tax saving avenues available for Indians	

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