**Investment Analysis and Portfolio Management**

**September 2023 Examination**

**1. Mr. A invested in stock market, but he is shocked because many different charges have been imposed on him. As an investment adviser provide information to Mr. A about different charges that investors have to bear. (10 Marks)**

**Ans:**

**Introduction:**

Investing in the stock market can be a lucrative way to grow one's wealth through the years. But, traders need to be aware of the diverse expenses related to investing. These prices can affect an investor's overall returns and must be considered when making investment decisions. In this advisory, we can speak about the specific expenses investors should bear inside the inventory market, supplying Mr. A with valuable data to navigate the investment landscape effectively.

**Concept & Application:**

**1. Brokerage Commissions:**

One of the maximum everyday expenses buyers face is brokerage commissions. While you

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**2. Every investor expects maximum return from his investment. Suppose Mr. B buy 100 shares & invested Rs. 1, 00,000/- in share market for 1 year. How will you calculate the return from investment if company is giving dividend of Rs. 10/- per share & after 1-year price become 2000 per share. (10 Marks)**

**Ans :**

**Introduction:**

Investing in the stock market is common for people to develop wealth. One key element of investment is calculating the return on funding (ROI), which measures the profitability of funding. In this state of affairs, we can calculate the ROI for Mr. B's investment in the share market over one year. We will recollect the dividend obtained and the increase in the proportion fee to decide the general return on his investment.

**Concept & application:**

Right here are some extra points to increase at the creation regarding the expectations and

**3.**

**a. Mr. A got a new job & has a good salary. Now he is planning for investment in retirement plan. As an investment adviser give detail information about different retirement plans. (5 Marks)**

**Ans:**

**Introduction:**

Retirement planning is a crucial financial management component, ensuring individuals' comfortable and comfortable future when they stop operating. In India, numerous retirement plans provide individuals with various alternatives to accurately make investments in their money and construct a full-size corpus for their submit-retirement years. These plans permit

**b. If your friend asked you, how to measure mutual fund return, what would you tell? (5 Marks)**

**Ans ;**

**Introduction**

Measuring mutual fund returns is a crucial issue in evaluating the performance of an investment. Whether you're a pro investor or simply starting, knowing how to measure mutual fund returns is critical for making informed investment decisions. This manual will delve into mutual fund returns, explore various methods to measure them and discuss their