

M.B.A. (FSN) (Sem.-IV) Examination
Financial Planning and Wealth Management
May-2017

Time : 3 Hours]

[Max. Marks : 70

MBA FS : FPWM

Q.1 (A) List down twelve investment vehicles where an individual can invest in india. (7)

Q. 1 (B) Write down steps of financial planning process in detail. (7)

Q.2 (A) As a financial analyst which personal financial statements will be required to do a financial planning for an investor? (7)

Q.2 (B) Explain Emotional bias and loss aversion bias with example (7)

OR

Q.2(B) Explain Self-control bias and regret aversion bias with example.

Q.3 (A) Define Risk . Explain diversifiable and non-diversifiable risk with example. (7)

Q.3 (B) Write a note on regulation of an investment advisor. (7)

Or

Q.3 (B) Mr Wise is aged 30 years and he wants to plan for his retirement. He is confused over investing in Fixed Deposit and Mutual Funds. Advise him which will be the best option for him in which different situations?

Q.4 (A) Write a note on legal principles in insurance. (7)

Q.4 (B) Write a note on steps involved in designing ideal insurance plan. (7)

OR

Q.4 (B) Write a note on different types of provident funds.

Q.5 Answer any two from the following : (14)

(A) Mr A wants to invest Rs 15000 per month for next 25 years in a debt fund which gives return of 10% p.a. How much corpus he will receive at the end of 25th years.

(B) Mr B wants Rs 2.5 Crore at the end of 30 years from now. He wants to invest in Recurring Deposit which will give a return of 8% p.a. Advise him how much he should save now to get amount equivalent to Rs 2.50 Crore at the end of 30th year.

(C) Mr C wants to buy a car of Rs 5.00 lacs where in he can get 80% loan. Calculate his yearly EMI if he has to repay the loan within five years and rate of interest for the car loan is 10% p.a.