B.M.S. --- SEMESTER - 5

NAME OF SUBJECT : Wealth Management

NAME OF FACULTY: Karishma Meghani

DATE OF ASSIGNMENT GIVEN: 27/11/2020

DATE OF SUBMISSION: 2/12/2020

ASSIGNMENT TOPIC:

(COMMON OR INDIVIDUAL TOPIC AS PER ROLL NO WISE DECIDED BY SUBJECT TEACHER)

Common Topic:-

1) **Take a hypothetical figure and make a portfolio for the same & also do the rebalancing of the portfolio**
2) **Take a portfolio management company's details & talk about the portfolios managed by them & their working**
3) **Do tax & estate planning for a client**

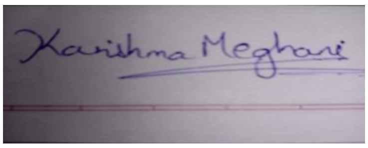
INSTRUCTIONS FOR THE ASSIGNMENT/PROJECT IN SUBJECT 1:

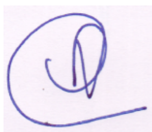
The students need to submit the assignment in a PPT format (2-4 slides) giving details of the valuation methods of companies along with relevant figures & data

INSTRUCTIONS FOR THE PRESENTATION/VIVA IN SUBJECT 1:

- *IT SHOULD BE INDIVIDUAL.*
- *TIME FOR INDIVIDUAL VIVA/PRESENTATION BETWEEN 3 TO 5 MIN.*
- *IT SHOULD BE COMPLETED MAX WITHIN 5 LECS. (300 MIN/60 STUD)*
- *IT SHOULD BE STRICKLY AS PER FOLLOWING SHEDULE.*
- *CHANGE IN SHEDULE OF PRESENTATION/VIVA ALLOWED AT THE PRIOR PERMISSION OF COORDINATOR/ EXAM COMMITTEE.*

ROLL NO	*DATE & DAY*	*DURING TIME OF LEC*	*EXTRA TIME/REMARK IF ANY*
	-NA-		





Signature : Faculty **Signature : Coordinator**