



MBA DEGREE EXAMINATIONS: APRIL / MAY 2023

(Regulation 2021)

Third Semester

MASTER OF BUSINESS ADMINISTRATION

P21MBE0553: Wealth Management

COURSE OUTCOMES

- CO1:** Provide an advanced understanding on the personal financial planning and wealth management.
CO2: Introduce the operational flow of financial transactions in financial markets.
CO3: Provide comprehensive wealth management services with an understanding of regulatory environment.

Time: Two Hours

Maximum Marks: 50

PART A (1 x 10 = 10 Marks)

- 1 An investor is planning to invest for his future but he wants to know the returns he could expect from the investment and his investment decision will be based on it. He has chosen three investment options, first is an option in which he will invest in lumpsum for 5 years, second is an option in which he will invest a fixed amount on monthly basis for 5 years and the third is an option in which he will invest in irregular amount every month for 5 years. As a wealth manager you have to recommend the methods and tools to calculate the returns? K4 CO2

PART B (5 x 2 = 10 Marks)

- 2 What is real rate of return? K1 CO1
- 3 What is the difference between nominal return and effective return? K1 CO1
- 4 What is tax adjusted return? K1 CO1
- 5 List any two regulators. K1 CO1
- 6 What is Wealth Management and how it differs from Asset Management? K1 CO1

PART C (3 x 10 = 30 Marks)

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| 7 | a | Explain in detail about the economic market indicators that affect your personal financial planning. | K3 | CO1 |
| | b | Mutual funds are a good asset for comprehensive financial planning – Justify the context in detail | K5 | CO3 |
| 8 | a | Explain the role of regulators in detail | K2 | CO3 |
| | b | Discuss the possibilities as how absolute return and annualized returns may affect your personal financial planning. | K5 | CO2 |
| 9 | a | List and explain investment products in detail. | K5 | CO3 |
| | b | Evaluating insurance needs for life and general insurance – Explain Evaluate and explain the need for insurance for life & properties. | K5 | CO3 |
