



**MBA DEGREE EXAMINATIONS: NOV / DEC 2024**

(Regulation 2021)

Third Semester

**MASTER OF BUSINESS ADMINISTRATION**

P21MBE0553: Wealth Management

**COURSE OUTCOMES**

**CO1:** Introduce the characteristics of financial products which includes AIFs as well.

**CO2:** Provide basic understanding on personal financial planning and wealth management.

**CO3:** Comprehend the process of financial planning and investment advice.

**Time: Three Hours**

**Maximum Marks: 100**

**PART A (10 Q x 10 Marks = 100 Marks) Answer All Questions**

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|----|--|----|-----|-------------------|
| 1. | Explain how RBI and SEBI contribute to the stability and development of India's financial market.                                  | 10 | CO1 | [K <sub>2</sub> ] |
| 2. | Explain how mutual funds and direct equity differ in terms of risk and return for retail investors.                                | 10 | CO1 | [K <sub>2</sub> ] |
| 3. | Compare nominal returns and real returns. Why is it important for investors to understand this difference?                         | 10 | CO2 | [K <sub>2</sub> ] |
| 4. | Analyze how macroeconomic factors like inflation, interest rates, and tax policies impact the returns on fixed income instruments. | 10 | CO3 | [K <sub>4</sub> ] |
| 5. | Explain the importance of estimating a retirement corpus.  | 10 | CO1 | [K <sub>2</sub> ] |
| 6. | Compare the features, benefits, and risks of annuity plans and pension funds as retirement products.                               | 10 | CO2 | [K <sub>2</sub> ] |
| 7. | Apply the principles of estate planning to help a client ensure a smooth transfer of wealth to heirs?                              | 10 | CO3 | [K <sub>3</sub> ] |
| 8. | Explain the fundamental differences between the needs approach and the human life value approach in life insurance analysis        | 10 | CO1 | [K <sub>2</sub> ] |

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|-----|---|----|-----|-------------------|
| 9.  | Analyze the different types of risks individuals face in personal finance and how insurance can mitigate these risks. | 10 | CO3 | [K <sub>4</sub> ] |
| 10. | Explain the role of Alternative Investment Funds (AIFs) in portfolio diversification.                                 | 10 | CO1 | [K <sub>2</sub> ] |

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