Exam.Code:5174
Sub. Code: 14574

2056
Bachelor of Commerce (Financial Markets) FYUP
Fourth Semester
NBCM-404: Wealth Management - An Introduction

Time allowed: 3 Hours | Max. Marks: 60

NOTE: *Attempt four short answer type questions from Section–A. Attempt two questions each from Section B and C respectively.*

x-x-x

Section – A

I. Attempt any four of the following:-

a) What is Wealth Management? State its key objectives.

b) Explain the importance of financial goal setting for individuals.

c) Define mutual funds and mention their types.

d) What are bonds? State their features.

e) What do you understand by insurance? State its importance.

f) Define asset allocation and state its objectives. (4x5)

Section- B

II. Define Wealth Management. Explain its scope and significance in modern financial planning. (10)

III. Discuss the role of financial assessment in designing an effective wealth management strategy. (10)

IV. Explain different investment avenues available in India and abroad. Highlight their advantages and limitations. (10)

V. Examine the relationship between risk and return in various investment instruments. How should an investor evaluate risk before investing? (10)

Section- C

VI. Explain the concept of risk management through insurance. Discuss various types of insurance products in detail. (10)

P.T.O.

VII. What is risk profiling? Explain its importance in wealth management and its impact on investment decisions. (10)

VIII. Distinguish between strategic and tactical asset allocation. Explain their relevance in portfolio management. (10)

IX. Discuss fixed and flexible asset allocation strategies. Which one is more suitable for long-term investors? Give reasons. (10)

x-x-x