

M. Voc. Management (Banking and Finance)
NCrF Level -6.5

For Academic Session 2024-25 & onwards



Prepared by

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Skill Department of Banking and Finance

(Skill Faculty of Management Studies & Research)

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Scheme and Syllabus for M.Voc Management (Banking and Finance)

About the Program:

This M.Voc Management (Banking and Finance) program is designed to equip students with advanced knowledge and skills in banking and finance, along with specialized training to prepare them for the Qualification of a Relationship Manager- Personal Banking. The program spans over two years and is divided into four semesters, integrating both theoretical and practical learning.

Eligibility , Levels of Awards and Multiple Entry -Exit

Eligibility

A bachelor's degree or B.Voc from any recognised Institute / University securing minimum 50% marks in aggregate (45% for SC/ST Candidates of Haryana) or equivalent CGPA.

Lateral Entry:

A bachelor's degree with Honours/ Honours with Research in Commerce /Banking / Financial Services or any related area with a minimum of 160 credits

Exit

For those who join 2 year MVoc programme, there shall only be one exit point. Students who exit at the end of 1st year shall be awarded a Postgraduate Diploma in Vocation – Management (Banking & Finance)

Award	Level	Credit
PG Diploma- Vocation Management (Banking & Finance)	Level 6	Credit 40
1 Year M.Voc – Management (Banking & Finance) after 4 Year UG	6.5	Credit 40
2 Year M.Voc – Management (Banking & Finance) after 3 Year UG	6.5	Credit 40+40

Re-entry Criteria in to Second Year (Third Semester)

The student who takes an exit after first year with an award of PG Diploma may be allowed to re-enter in to third Semester for completion of the MVoc Program after earning requisite credits in the first year

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Program Outcomes (POs):

- **PO1:** Develop comprehensive knowledge in banking and finance principles.
- **PO2:** Demonstrate proficiency in personal banking services.
- **PO3:** Apply strategic decision-making skills in banking operations.
- **PO4:** Exhibit ethical conduct and professional behavior in financial services.

Program Educational Objectives (PEOs):

- **PEO1:** To train students in advanced financial management and personal banking services.
- **PEO2:** To enhance students' ability to analyze and solve complex financial issues.
- **PEO3:** To develop leadership and managerial skills tailored for the banking sector.
- **PEO4:** To promote entrepreneurial thinking and innovation in banking and finance.

Program Specific Objectives (PSOs):

- **PSO1:** Apply banking regulations and compliance standards in professional practice.
- **PSO2:** Utilize advanced financial tools and techniques for effective banking management.
- **PSO3:** Foster customer relationship management and personalized banking solutions.


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Scheme of the Program:

Semester 1: 22 Credits

Semester 2: 22 Credits

Semester 3: 22 Credits

Semester 4: 22 Credits



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Semester I

Course Code	Subject	C/ O	Credit				Notional Hours						Marks (Theory)				Marks (Practical)			To
			T	Tu	P	To	T	Tu	P	O/A *	To	I	E	To	I	E	To			
24PMBF01	Accounting & Finance for Managers	DSC	3	1	0	4	45	15	0	60	120	30	70	100	-	-	-	100		
24PMBF02	Banking Operations and Services	DSC	3	1	0	4	45	15	0	60	120	30	70	100	-	-	-	100		
24PMBF03	Financial Institutions & Markets	DSC	3	1	0	4	45	15	0	60	120	30	70	100	-	-	-	100		
24PMBF04	Marketing Management	DSC	3	1	0	4	45	15	0	60	120	30	70	100	-	-	-	100		
24PMBM01	Entrepreneurship	MOOC/ MDE	2	0	0	2	30	0	0	30	60	30	70	100	-	-	-	100		
24PMBV01	Business Communication	VAC	2	0	0	2	30	0	0	30	60	30	70	100	-	-	-	100		
24PMBMBA01	Spreadsheet Modelling	AEC	0	0	2	2	0	0	60	0	60	-	-	-	70	30	100	100		
Total			16	4	2	22	240	60	60	300	660	180	420	600	70	30	100	700		

Semester II

Course Code	Subject	C/O	Credit				Notional Hours				Marks (Theory)				Marks (Practical)			
			T	Tu	P	To	T	Tu	P	O/A*	To	I	E	To	I	E	To	
24PMBF05	Research Methodology	DSC	3	1	0	4	45	15	0	60	120	30	70	100	-	-	-	100
24PMBM01	Research Project	SEC	0	0	4	4	0	0	120	0	120	-	-	-	70	30	100	100
24PMBM02	OJT – I	SEC	0	0	14	14	0	0	420	0	420	-	-	-	245	105	350	350
Total			3	1	18	22	45	15	540	60	660	30	70	100	315	135	450	550

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Semester III

Course Code	Subject	C/ O	Credit				Notional Hours						Marks (Theory)				Marks (Practical)			To
			T	Tu	P	To	T	Tu	P	O/A*	To	I	E	To	I	E	To			
24PMBF06	Contemporary Issues and Technology in Banking	CC	3	1	0	4	45	15	0	60	120	30	70	100	-	-	-	100		
24PMBF07	Security Analysis & Portfolio Management	CC	3	1	0	4	45	15	0	60	120	30	70	100	-	-	-	100		
24PMBF08	Financial Instruments	CC	3	1	0	4	45	15	0	60	120	30	70	100	-	-	-	100		
24PMBF09	Customer Relationship Management	CC	3	1	0	4	45	15	0	60	120	30	70	100	-	-	-	100		
24PMBF10	Financial Planning and Risk Management	CC	3	1	0	4	45	15	0	60	120	30	70	100	-	-	-	100		
24PMBM02	Applied Personal Finance Management	MDE	2	0	0	2	30	0	0	30	60	30	70	100	-	-	-	100		
Total			17	5	0	22	255	75	0	330	660	180	420	600	-	-	-	600		

Semester IV

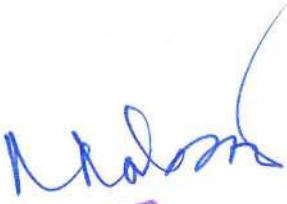
Course Code	Subject	C/ O	Credit				Notional Hours					Marks (Theory)			Marks (Practical)			To
			T	Tu	P	To	T	Tu	P	O/ A*	To	I	E	To	I	E	To	
24PMBM03	Indian Knowledge System in Service Management	DSE	2	0	0	2	30	0	0	30	60	30	70	100	-	-	-	100
24PMBV02	Human Values and Business Ethics	VAC	2	0	0	2	30	0	0	30	60	30	70	100	-	-	-	100
24PMBS03	Dissertation	SEC	0	0	4	4	0	0	120	240	-	-	-	-	30	70	100	100
24PMBS04	OJT – 2	SEC	0	0	14	14	0	0	420	840	-	-	-	-	245	105	350	350
Total			4	0	18	22	60	0	540	600	1200	60	140	200	275	175	450	650

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* Other Learning Activities includes the following:

- End term Exam/ class tests/ case studies/ simulation/ quiz/ PPTs/ and other assessments
- Value education classes, Career Counselling sessions
- Events/ Competitions/ Workshops/ Expert Lectures
- Life skills-based education
- Social/ community work
- Vocational education/ training/ Value added Courses
- Field visits/ Projects
- Role Plays
- Problem solving exercises


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SEMESTER-I

Course Title: Accounting & Finance for Managers

Course Credit: 4 (3-1-0)

Course No. 24PMBF01

Max. Marks: 100(30I+70E)

Course Objective: This course provides a comprehensive understanding of accounting and interpret financial statements. This will help managers to understand the role of managerial accounting in planning, controlling, and decision-making within organizations.

Learning Outcomes: Students will be able to:

CO1: Understand the financial accounting, accounting cycle and financial ratios to assess a company's performance and financial health.

CO2: Understand the concept of time value of money and budgeting process.

CO3: Apply various theories of capital structure and evaluation of their cost.

CO4: Create working capital policy for organization.

CO5: Apply various theories of dividend policy.

Course Content:

Unit / CO	Course Content
Unit-I (CO1)	Introduction to Accounting Principles: Introduction to financial accounting; Understanding the accounting cycle; Principles of accrual accounting; Financial statements and reporting standards. Financial Statement Analysis: Ratio analysis and interpretation; Evaluating profitability and solvency; Assessing financial health and performance.
Unit-II (CO2)	Financial Management: meaning, objectives and scope; types of financial decisions, risk-return framework for financial decision-making, time value of money. Capital Budgeting Decisions: nature, importance and types of investment decision; techniques of evaluating capital budgeting decisions, risk analysis in capital budgeting.
Unit-III (CO3)	Capital Structure Decisions: optimum capital structure; theories of capital structure; factors determining capital structure. Sources of long term and short-term finance. Cost of Capital: concept and importance; computations of cost of various sources of finance; weighted average cost of capital.
Unit-IV (CO4)	Working Capital Management: Concept and types of working capital; operating cycle, determinants of working capital, estimation of working capital requirement; working capital policy; Management of cash, accounts receivables and inventories; financing working capital.

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Unit-V (CO5)	Dividend Policy: Dividend and its forms, theories of dividend policy and their impact on the value of a firm; types of dividend policy. An overview of Corporate Restructuring.
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* **Pedagogical Tools** and Other Learning Activities (for 60 hours) includes the following:

- End term Exam/ class tests/
- case studies/ quiz/
- PPTs
- Events/ Competitions/ Workshops/ Expert Lectures
- Problem Solving Exercises
- Demonstration Tasks
- Projects

Assessment Strategy

Tool	Marks
End Term Exam	70
Mid Term Exams	10
Presentations (Case studies / /Topics/Demonstrations)	5
Assignment (Project / Problem Solving Exercises / Events/ Competitions/ Workshops/ Expert Lectures Participation)	5
Attendance	10

Suggested Readings:

1. Van Horne, James C., Financial Management and Policy, Prentice Hall of India.
2. Pandey I. M., Financial Management, Vikas Publishing.
3. Damodaran, A, Corporate Finance: Theory and Practice, John Wiley & Sons.
4. Hampton, John. Financial Decision Making, Englewood Cliffs, Prentice Hall Inc.
5. Khan, M.Y. & Jain, P.K., Financial Management, McGraw Hill.


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Course Title: Banking Operations and Services

Course Credit: 4 (3-1-0)

Course No. 24PMBF02

Max. Marks: 100(30I+70E)

Course Objective: This course provides an overview of banking functions and retail banking products. This will help managers to understand the role of Banking products and services prevailing in market.

Learning Outcomes: Students will be able to:

CO1: Understand banking structure and their significance in economic growth and development.

CO2: Develop a comprehensive understanding of financial and digital literacy.

CO3: Understand the opportunities and functions of liability products, and emerging opportunities in the banking sector.

CO4: Understand the various types of accounts and the process of account opening.

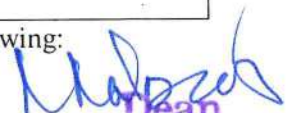
CO5: Gain an understanding of various asset products and priority sector lending.

Course Content:

Unit / CO	Course Content
Unit-I (CO1)	Indian Banking System: Overview, Introduction, structure and type of banks, role & responsibilities; Significance of banks in growth and development of economy; Banking Regulation: Role of RBI, Constitution, Objectives, Functions of RBI; Instruments of Monetary Control-CRR, SLR, Repo, Reverse Repo, Bank rate, OMO; Regulatory Restrictions.
Unit-II (CO2)	Financial and Digital Literacy, Banking and online Frauds (Case Studies), Fintech, Digital transactions.
Unit-III (CO3)	Liability Products (deposits): opportunities; remittance and payment Services (Draft, RTGS, IMPS, NEFT, etc); Universal Banking; Cross Selling, Bancassurance and ancillary services (locker, custodial, etc); ATMs, POS; emerging opportunities.
Unit-IV (CO4)	Types of Accounts, Opening of accounts, KYC; Internet banking and mobile banking, International transactions, FDI remittances.
Unit-V (CO5)	Asset Products (Loan): Home Loans, Personal Loans; consumer loans; Education loans and others; introduction to business loans (terms loans and cash credit); Priority sector lending-agricultural, SME and Microfinance.

* **Pedagogical Tools** Other Learning Activities (for 60 hours) includes the following:

- End term Exam/ class tests
- case studies/ simulation/ quiz
- PPTs


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- Events/ Competitions/ Workshops/ Expert Lectures
- Field visits/ Projects
- Role Plays
- Demonstrations

Assessment Strategy

Tool	Marks
End Term Exam	70
Mid Term Exams	10
Presentations (Case studies / Role Plays /Topics/Demonstrations)	5
Assignment (Project / Events/ Competitions/ Workshops/ Expert Lectures Participation/ Social/ community work/ /field visit)	5
Attendance	10

Suggested Readings:

1. Arondekar, A.M., Agarwal, O.P., Nath, Dr. Onkar, Khandelwal, P.S. (2005). *Principles & Practices of Banking*. Macmillan India Limited.
2. Dutta, S.K., Prasad, P.S.R., Bhorkar, A.D., Bargir, S.D. (Publisher: Macmillan India Limited, 2005) - Accounting & Finance for Bankers
3. Zacharias, K.D., Ravindranath, C.P., Kulkarni, P.R., Gopalakrishnan, B. (Publisher: Macmillan India Limited, 2005) - Legal Aspects of Banking Operations
4. Vasavada, Gaurang, Kumar, Dr. Sharad, Rao, Dr. S. Upendra, Pai, Dr. Satish (2005). *General Bank Management*. Macmillan India Limited.
5. Rao, P.M. (2002). *Financial Services: Text, Cases and Strategies*. Deep & Deep Pvt. Ltd., New Delhi.
6. Agrawal, O.P. (2008). *International Banking and Finance*. Himalaya Publishing House.
7. Koch, Timothy W., MacDonald, S. Scott (2014). *Bank Management*. Cengage Learning.
8. Rose, Peter S., Hudgins, Sylvia C. (2012). *Bank Management and Financial Services*. McGraw-Hill Education.
9. Choudhry, Moorad (2011). *The Principles of Banking*. John Wiley & Sons.
10. Heffernan, Shelagh (2005). *Modern Banking*. John Wiley & Sons.

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Course Title: Financial Institutions & Markets

Course Credit: 4 (3-1-0)

Course No. 24PMBF03

Max. Marks: 100(30I+70E)

Course Objective: This course will enlighten and acquaint the students with the concepts and practical dynamics of financial institutions and markets.

Learning Outcomes: Students will be able to:

CO1: Comprehend the need and role of Indian financial system and financial markets.

CO2: Understand the regulatory framework governing financial services in India.

CO3: Understand the concept and importance of venture capital in India.

CO4: Understand the concept of credit rating, and gain insights into factoring.

CO5: Analyze the organization and management of mutual funds in India.

Course Content:

Unit / CO	Course Content
Unit-I (CO1)	Structure of Financial System: Role of Financial System in Economic Development, Financial Markets and Financial Instruments, Capital Markets, Money Markets, Primary Market Operations, Role of SEBI, Secondary Market Operations, Regulation, Functions of Stock Exchanges, Listing, Formalities, Financial Services Sector Problems and Reforms and Operations, role of NSDL and CSDL.
Unit-II (CO2)	Financial Services: Concept, Nature and Scope of Financial Services, Regulatory Frame Work of Financial Services, Growth of Financial Services in India, Merchant Banking, Meaning, Types, Responsibilities of Merchant Bankers, Role of Merchant Bankers in Issue Management, Regulation of Merchant Banking in India.
Unit-III (CO3)	Venture Capital: Growth of Venture Capital in India, Financing Pattern under Venture Capital, Legal Aspects and Guidelines for Venture Capital, Leasing, types of Leases, Evaluation of Leasing Option Vs. Borrowing.
Unit-IV (CO4)	Credit Rating, Meaning, Functions, Debt Rating System of CRISIL, ICRA and CARE. Factoring, Forfeiting and Bill Discounting, Types of Factoring Arrangements, Factoring in the Indian Context.
Unit-V (CO5)	Mutual Funds, Concept and Objectives, Functions and Portfolio Classification, Organization and Management, Guidelines for Mutual Funds, Working of Public and Private Mutual Funds in India. Debt Securitisation, Concept and Application, De-mat Services: need and importance.

* **Pedagogical Tools** and Other Learning Activities (for 60 hours) includes the following:

- End term Exam/ class tests/ case studies/ simulation/ quiz
- PPTs

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- Events/ Competitions/ Workshops/ Expert Lectures
- Value added Courses
- Field visits/ Projects

Assessment Strategy

Tool	Marks
End Term Exam	70
Mid Term Exams	10
Presentations (Case studies /Topics)	5
Assignment (Project / Events/ Competitions/ Workshops/ Expert Lectures Participation/ field visit/value added courses)	5
Attendance	10

Suggested Readings:

1. Anthony Saunders and Marcia Millon Cornett, *Financial Markets and Institutions*, Tata McGraw Hill, 2019
2. V.A. Avadhani, *Marketing of Financial Services*, Himalaya Publishing House, 2017
3. G.S. Batra, *Management of Financial Institutions and Markets*, Deep & Deep Publications, 2016
4. L.M. Bhole and J. Mahakud, *Financial Institutions and Markets*, Tata McGraw Hill, 2020
5. Vasanth Desai, *Financial Markets and Financial Services*, Himalaya Publishing House, 2018
6. Jakob de Haan, Sander Oosterloo, Dirk Schoenmaker, *Financial Markets and Institutions*, Cambridge University Press, 2018
7. Punithavathy Pandian, *Financial Markets and Services*, Vikas Publishing House, 2016

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Course Title: Marketing Management**Course Credit: 4 (3-1-0)****Course No. 24PMBF04****Max. Marks: 100(30I+70E)**

Course Objective: The course aims to develop an understanding of the underlying concepts, strategies and issues involved in the marketing of products and services.

Learning Outcomes: Students will be able to:

CO1: Scan the Marketing environment

CO2: Apply product and pricing decisions

CO3: Apply channel management strategies

CO4: Understand Promotional mix

CO5: Evaluate the marketing strategies and programmes of different products in real world.

Course Content:

Unit/ CO	Course Content
Unit-I (CO1)	Concept of marketing, scope of marketing; Marketing Mix; Marketing Environment and Environment Scanning; Marketing Information System and Marketing Research; Understanding Consumer and Industrial Markets; Market Segmentation, Targeting and Positioning.
Unit-II (CO2)	Product decisions: Product concept and classification, product mix, product life cycle, new product development; Product branding, packaging and labeling decisions; Pricing decisions: Factors affecting pricing decisions, Pricing strategies and methods.
Unit-III (CO3)	Distribution channels and Logistics management: nature, types and role of intermediaries, factors influencing the channel selection; conflict management, Logistics management: objectives and major decisions areas of logistics.
Unit-IV (CO4)	Promotional and communication decisions: promotion mix, role of advertising, sales promotion, personal selling and public relations.
Unit-V (CO5)	Holistic marketing: Internal marketing, Socially responsible marketing. Digital marketing

* **Pedagogical Tools** and Other Learning Activities (for 60 hours) includes the following:

- End term Exam/ class tests
- case studies/ simulation/ quiz
- PPTs
- Project using product launch of hypothetical product
- Events/ Competitions/ Workshops/ Expert Lectures
- Role Plays


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- Value added Courses

Assessment Strategy

Tool	Marks
End Term Exam	70
Mid Term Exams	10
Presentations (Case studies / Role Plays /Topics/Demonstrations/)	5
Assignment (Project / Events/ Competitions/ Workshops/ Expert Lectures Participation/ field visit/value added courses)	5
Attendance	10

Suggested Readings:

1. Aaker, D. A., & Keller, K. L. (2021). Strategic market management. John Wiley & Sons.
2. Belch, G. E., & Belch, M. A. (2021). Advertising and promotion: An integrated marketing communications perspective. McGraw-Hill Education.
3. Czinkota, Michael R. and Kotabe, Masaaki, *Marketing Management*, Thomson Learning, 2019.
4. Ferrell, O. C., & Hartline, M. D. (2019). Marketing strategy. Cengage Learning.
5. Kotler, P., & Keller, K. L. (2019). Marketing management. Pearson.
6. Kumar, Arun and Meenakshi, N., *Marketing Management*, Vikas Publishing House Pvt. Ltd., 2022.
7. McDonald, M., & Wilson, H. (2020). Marketing plans: How to prepare them, how to profit from them. John Wiley & Sons.
8. Prahalad, C.K., *The Fortune at the Bottom of the Pyramid*, FT Press, 2016.
9. R. Srinivas, *Case Studies in Marketing - Indian Context*, PHI Learning, 2017.
10. Rajan Saxena, *Marketing Management*, McGraw Hill, 2021.


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Course Title: Entrepreneurship

Course Credit: 2 (2-0-0)

Course No. 24PMBM01

Max. Marks: 100(30I+70E)

Course Objective: The objective of this course is to expose the learner to the fields of entrepreneurship development. Focus will be to train the students to develop new projects and encouraging them to start their own ventures.

Learning Outcomes: Students will be able to:

CO1: Understanding of Entrepreneurial Ecosystem.

CO2: Conduct feasibility studies

CO3: Develop a business plan

CO4: Appraise various initiatives and supporting startups

CO5: Understanding of registration process for launching startups.

Course Content:

Unit / CO	Course Content
Unit-I (CO1)	Concept of Entrepreneur and Entrepreneurship, Entrepreneur vs. Manager, Significance of Entrepreneurship in Economic Development; Characteristics/ Qualities of Entrepreneurs, Social Entrepreneurship, Entrepreneurial Ecosystem.
Unit-II (CO2)	Start-up Idea generations and evaluation, Criteria to select a product, Conducting feasibility study
Unit-III (CO3)	Minimum Viable Product, Business plan, Sources of Finance for Entrepreneurship: Angel Funding, Venture Funding, Bank loans, Government funding schemes, Micro Finance.
Unit-IV (CO4)	Government initiatives for start-up support, Role of support bodies like NIESBUD, SIDBI, Incubators.
Unit-V (CO5)	Introduction to various forms of business organization (sole proprietorship, partnership, corporations, Limited Liability company), Registration formalities for startups.

* Pedagogical Tools and Other Learning Activities (for 30 hours) includes the following:

- End term Exam/ class tests/
- case studies/ simulation
- PPTs
- Career Counselling sessions
- Events/ Competitions/ Workshops/ Expert Lectures
- Business Plan development
- Social/ community work


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- Entrepreneurial pitch

Assessment Strategy

Tool	Marks
End Term Exam	70
Mid Term Exams	10
Presentations (e-Pitch)	5
Assignment (Business Plan)	5
Attendance	10

Suggested Readings:

1. Barringer, B. R., & Ireland, R. D. (2019). Entrepreneurship: Successfully Launching New Ventures. Pearson.
2. Burns, P. (2020). Entrepreneurship and Small Business: Start-Up, Growth and Maturity. Palgrave Macmillan.
3. Gupta, V. K., & Dutta, D. K. (2019). Entrepreneurship: Concepts, Theory, and Perspective. Springer.
4. Forbat John, "Entrepreneurship" 1st Edition, New Age International, 2008.
5. Havinal, Veerbhadrappa, "Management and Entrepreneurship", 1st Edition, New AgeInternational Publishers, 2008.
6. Prahlad, CK., Fortune at the Bottom of the Pyramid: Eradicating Poverty Through Profits, Ist Edition; Dorling Kindersley Ltd, 2006.

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Course Title: Business Communication

Course Credit: 2 (2-0-0)

Course No. 24PMBV01

Max. Marks: 100(30I+70E)

Course Objective: This course will make students conversant with the basic forms, formats and techniques of business writing so that they would be thoroughly prepared to communicate effectively in all contexts.

Learning Outcomes: Students will be able to:

- CO1: Understanding the role of communication in the organizational and Global Context
- CO2: Perform effective written and verbal communication
- CO3: Perform effective interpersonal communication
- CO4: Analyzing one's own communication style in different contexts and mediums
- CO5: Perform effective communication during Interviews

Course Content:

Unit/ CO	Course Content
Unit-I (CO1)	Concepts of Communication in Business: Introduction to Business Communication, Components of Communication (7Cs), Listening Skills, Verbal and Non-Verbal Skills, Effective Presentation Skills.
Unit-II (CO2)	Formal Communication: Writing effective formal Emails, Reports and proposal writing,
Unit-III (CO3)	Interpersonal Communication Skills: Communicating in teams, Negotiation Skills, Communication skills during a conflict, Mentoring and Appraisals, Communication in Social Media and Digital Communication
Unit-IV (CO4)	Cross Cultural Communication: Theoretical Framework of Cross-Cultural Communication, Communication across cultures through different mediums, Business Etiquettes across cultures
Unit-V (CO5)	Communication for career: Resume writing and cover letters, Group Discussions and Interviews, Communication during Exit Interviews, Ethics and Communication

* **Pedagogical Tools** and Other Learning Activities (for 60 hours) includes the following:

- End term Exam/ class tests
- case studies/ simulation/ quiz
- PPTs
- Career Counselling sessions
- Events/ Competitions/ Workshops/ Expert Lectures
- Life skills-based education
- Social/ community work


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- Vocational education/ training/ Value added Courses
- Field visits/ Projects
- Role Plays
- Demonstrations

Assessment Strategy

Tool	Marks
End Term Exam	70
Mid Term Exams	10
Presentations (Case studies / Role Plays /Topics/Demonstrations)	5
Assignment (Events/ Competitions/ Workshops/ Expert Lectures Participation/ value added courses etc)	5
Attendance	10

Suggested Readings:

1. Lehman, C. M., Dufrene D. D., & Sinha, M. (2022). *BCOM: The South Asian Perspective on Business Communication*. New Delhi: Cengage Learning.
2. Murphy, H. A., Hildebrandt, H. W., & Thomas, J. P. (2016). *Effective Business Communication*. Boston: McGraw-Hill Companies.
3. Bovee, C., Thill, J. V., & Raina, R. L. (2020). *Business Communication Today*. Pearson.
4. Mukerjee, H. S. (2018). *Business Communication*. New Delhi: Oxford University Press.
5. Post, Emily. (2014). *The Etiquette Advantage in Business*. New York: Collins.
6. Sandra, M. O. (2019). *Handbook of Corporate Communication and Strategic Public Relations: Pure and Applied*. Routledge.
7. Locker, K. O., & Kaczmarek, S. K. (2017). *Business Communication: Building Critical Skills*. New York: McGraw-Hill Education.
8. Guffey, M. E., & Loewy, D. (2018). *Business Communication: Process and Product*. Boston: Cengage Learning.
9. Beebe, S. A., & Masterson, J. T. (2019). *Communicating in Small Groups: Principles and Practices*. Boston: Pearson.
10. Lewicki, R. J., Barry, B., & Saunders, D. M. (2020). *Negotiation: Readings, Exercises, and Cases*. New York: McGraw-Hill Education.
11. Samovar, L. A., Porter, R. E., & McDaniel, E. R. (2016). *Communication Between Cultures*. Boston: Cengage Learning.
12. Asher, D. (2019). *Cracking the Coding Interview: 189 Programming Questions and Solutions*. CareerCup.

Course Title: Spreadsheet Modelling**Course Credit: 2 (0-0-2)****Course No. 24PMBA01****Max. Marks: 100(70I+30E)**

Course Objective: To handle volume of data in effective manner, improve their analytical skills and make them understand about the role of data in a business

Learning Outcome: Students will be able to:

CO1: Proficiently utilize mathematical, financial, statistical, and logical functions to solve complex problems and perform advanced data analysis in various business contexts.

CO2: Analyze data using one-input and two-input data tables, perform multiple operations tables, and utilize sorting and filtering techniques.

CO3: Perform data analysis using Data Analysis tools and DEA Solver for optimization and decision-making processes.

CO4: Prepare comprehensive CMA (Credit Monitoring Arrangement) data and accurately assess the permissible bank finance for businesses.

CO5: Effectively utilize data analysis tools to solve complex problems in operations, finance, human resources, and marketing.

Course Content:

Unit/ CO	Course Content
Unit-I (CO1)	Functions & Formulae: Mathematical, Financial, Statistical, Logical functions
Unit-II (CO2)	Analysis: Use one-input, two-input data tables/multiple operations tables; Sorting and filtering: Sort data by multiple columns at same time, Create a customized list and perform a custom sort, macros, Customer feedback analysis.
Unit-III (CO3)	Linear programming –Basic, two-level nested functions; Analysis using the Data analysis tools and DEA Solver.
Unit-IV (CO4)	Preparation of CMA data and assessment of the permissible bank finance
Unit-V (CO5)	Use of Data Analysis tool to solve Problems related to Operations, Finance, HR, Marketing.

* **Pedagogical Tools** and Other Learning Activities (for 60 hours) includes the following:

- End term Practical/ class tests/
- case studies
- PPTs
- Data based exercises
- Demonstration
- Projects

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Practical:

- ✓ Charts and Tables
- ✓ Text Functions
- ✓ Date and time Functions
- ✓ Statistical functions
- ✓ Financial Function
- ✓ Logical Functions
- ✓ Pivot
- ✓ Look Up
- ✓ Nested
- ✓ Case Study Analysis in different areas
- ✓ Preparation of CMA Data Analysis

Assessment Strategy

Tool	Marks
External Practical	30
Internal Practical	30
Presentations	20
Assignment (Data based exercises)	10
Attendance	10

Suggested Readings:

1. Levine, D. M., Stephan, D. F., Krehbiel, T. C., & Berenson, M. L. (2010). *Statistics for Managers Using Microsoft Excel*. New Delhi: PHI Learning Private Limited.
2. Guerrero, H. (2010). *Excel Data Analysis: Modeling and Simulation*. New York: Springer.
3. Keller, G. (2018). *Managerial Statistics*. Boston: Cengage Learning.
4. Srivastava, T. N. (2012). *Statistics for Management*. New Delhi: Tata McGraw Hill Publishing Company.
5. Chawla, D., & Sondhi, N. (2011). *Research Methodology: Concepts and Cases*. New Delhi: Vikas Publishing House Private Limited.
6. Albright, S. C., Winston, W. L., & Zappe, C. J. (2016). *Data Analysis and Decision Making*. Cengage Learning.
7. Benninga, S. (2014). *Financial Modeling*. MIT Press.
8. Berenson, M. L., Levine, D. M., & Szabat, K. A. (2018). *Basic Business Statistics: Concepts and Applications*. Pearson.
9. Cooper, W. W., Seiford, L. M., & Tone, K. (2007). *Data Envelopment Analysis: A Comprehensive Text with Models, Applications, References and DEA-Solver Software*. Springer.
10. Evans, J. R. (2019). *Business Analytics: Methods, Models, and Decisions*. Pearson.

11. Taha, H. A. (2017). *Operations Research: An Introduction*. Pearson.
12. Walkenbach, J. (2019). *Excel 2019 Power Programming with VBA*. Wiley.
13. Winston, W. L. (2016). *Microsoft Excel 2016 Data Analysis and Business Modeling*. Microsoft Press.


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SEMESTER-II

Course Title: Research Methodology

Course Credit: 4 (3-1-0)

Course No. 24PMBF05

Max. Marks: 100(30I+70E)

Course Objective: This course is designed to introduce the students to the fundamentals of research methods and to equip them to follow scientific methods in solving business problems.

Course Outcomes: Students will be able to:

CO1: Identify, articulate, and refine research problems relevant to business contexts, emphasizing clarity, significance, and feasibility in problem formulation.

CO2: Understanding of research design principles, and application of appropriate data collection techniques.

CO3: Apply sampling concepts and techniques essential for effective business research.

CO4: Conduct univariate and bivariate analyses of data, testing hypotheses, and apply parametric and non-parametric tests.

CO5: Perform effective report writing.

Course Content:

Unit/ CO	Course Content
Unit-I (CO1)	Introduction to Business Research. Formulation of the research problem and development of research hypotheses. Characteristics of Good Research, Ethics in Business Research. Research Process: Problem definition, Research Process.
Unit-II (CO2)	Research Design (Exploratory Research, Descriptive research and Experimental Research), Data collection, measurement and scaling: Secondary data collection methods, qualitative methods of data collection, attitude measurement and scaling, and questionnaire designing.
Unit-III (CO3)	Sampling Design: Sampling concepts, sampling techniques, sample size determination and data processing. Errors in Survey.
Unit-IV (CO4)	Preliminary data analysis and interpretation: Univariate and Bivariate analysis of data, Testing of hypotheses, Analysis of variance techniques (one way and two way ANOVA), non-parametric tests (chi-square test, run test, one sample and two sample sign test, Mann- Whitney U test, Wilcoxon Signed Rank Test and Kruskal – Wallis Test).
Unit-V (CO5)	Advance Data analysis techniques: Correlation and regression analysis, Factor Analysis, Discriminant analysis, Cluster analysis. Report writing and presentation of results.

*Pedagogical Tools and Other Learning Activities (for 60 hours) includes the following:

- End term Exam/ class tests/ case studies

- PPTs
- Problem solving exercises
- Events/ Competitions/ Workshops/ Expert Lectures
- Field visits/ Projects

Assessment Strategy

Tool	Marks
End Term Exam	70
Mid Term Exams	10
Presentations (Case studies //Topics/Demonstrations)	5
Assignment (Project / Problem Solving Exercises / Events/ Competitions/ Workshops/ Expert Lectures Participation)	5
Attendance	10

Suggested Readings:

1. Zikmund, W. G. Business Research Methods. Thomson.
2. Copper, D. R., Schindler P. S. & Sharma, J. K. Business Research Methods, McGraw Hill Education.
3. Burns, R. B. & Burns, R. A. Business Research Methods and Statistics using SPSS, SAGE Publications Ltd.
4. Bajpai, N, Business Research Methods, Pearson.
5. Chawla, D. & Sondhi N., Research Methodology: Concepts and Cases, Vikas Publishing House.
6. Panneerselvam, R, Research Methodology, Prentice Hall India.
7. Kothari, C.R. Research Methodology & Technique, New Age International Publishers.


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Course Title: Research Project

Course Credit: 4 (0-0-4)

Course No. 24PMBS01

Max. Marks: 100(70I+30E)

Course Objective: This course attempts to expose students to real life learning through projects where they can apply conceptual learning to job role of relationship management – Personal banking or Societal research

All students will have to take research projects in the area of Relationship management- Personal Banking or societal research . Each student will be attached with one internal faculty guide, with whom they shall be in continuous touch during the period.

Pedagogical Tools

- Mentoring
- Demonstrations
- Field visit
- Project

Assessment Strategy

Tool	Marks
External Practical viva	30
Internal Practical viva	30
Presentations of Research Report	10
Project Report	20
Attendance	10

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Course Title: OJT – 1**Course Credit: 14 (0-0-14)****Course No. 24PMBS02****Max. Marks: 350(245I+105E)**

Course Objective: On-the-job training (OJT) offers students several valuable learning opportunities that go beyond theoretical knowledge.

Course Outcomes: Here are some important things, a student can learn from OJT:

1. **Practical Application:** OJT allows students to apply theoretical knowledge in real-world scenarios. They can see how concepts taught in the classroom are actually implemented in practice.
2. **Skill Development:** It helps in honing specific skills relevant to the job or industry, such as communication skills, technical skills, problem-solving abilities, and teamwork.
3. **Industry Insights:** Students gain a deeper understanding of industry practices, norms, and challenges. This insight is crucial for aligning their career aspirations with the realities of the job market.
4. **Professional Behavior:** OJT teaches professionalism, including workplace etiquette, time management, and adapting to organizational culture.
5. **Networking:** It provides opportunities to build professional networks, interact with industry professionals, and potentially identify mentors who can provide guidance and support.
6. **Critical Thinking:** OJT often involves facing real-time challenges and making decisions. This fosters critical thinking and the ability to analyze situations pragmatically.
7. **Feedback and Improvement:** Students receive feedback on their performance, which helps them identify strengths and areas needing improvement. This feedback loop is essential for continuous personal and professional growth.
8. **Career Confidence:** Successful completion of OJT boosts students' confidence in their abilities and enhances their employability by demonstrating practical experience.
9. **Understanding Roles:** They gain clarity on different roles within the organization, understanding how various departments collaborate to achieve common goals.
10. **Personal Growth:** Beyond technical skills, OJT can contribute to personal growth by fostering independence, resilience, and adaptability in different work environments.

Overall, on-the-job training is a crucial bridge between academic learning and professional readiness, preparing students not just for their first job but for long-term career success.

All the students will submit their OJT Reports within a decided time-frame. Each student will be attached with one internal faculty guide, with whom they shall be in continuous touch during the period.



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SEMESTER-III

Course Title: Contemporary Issues and Technology in Banking

Course Credit: 4 (3-1-0)

Course No. 24PMBF06

Max. Marks: 100(30I+70E)

Course Objectives

1. To develop a comprehensive understanding of the current challenges and reforms in the global and Indian banking landscape.
2. To explore the role of digital transformation and fintech innovations in reshaping banking operations and customer experience.
3. To introduce emerging technologies such as AI, blockchain, and RPA and their application in core banking functions.
4. To examine legal, regulatory, and cybersecurity issues in the evolving digital banking ecosystem.
5. To analyze the role of banks in promoting ESG goals, sustainable finance, and responsible banking practices.

Learning Outcomes

After successful completion of this course, students will be able to:

1. **CO1:** Identify and critically evaluate key contemporary issues in banking such as NPAs, privatization, and post-COVID restructuring.
2. **CO2:** Explain the components of digital banking infrastructure including UPI, CBS, mobile banking, and API banking.
3. **CO3:** Analyze the impact of technologies like AI, machine learning, RPA, and blockchain on credit scoring, fraud detection, and customer service.
4. **CO4:** Assess the legal, compliance, and risk implications of digital innovations, focusing on data privacy, KYC, AML, and CFT frameworks.
5. **CO5:** Evaluate the role of banks in driving ESG initiatives and adopting green banking and sustainable development goals (SDGs).

Course Content:

Unit / CO	Course Content
Unit-I (CO1)	Overview of Contemporary Banking Issues: NPAs and stressed assets; Bank consolidation and privatization challenges; Regulatory reforms and BASEL III norms Post-COVID banking landscape; Evolving customer expectations and digital migration
Unit-II (CO2)	Digital Transformation in Banking: Core banking systems (CBS); Internet banking, mobile banking; Digital payments ecosystem: UPI, IMPS, NEFT, RTGS, wallets, QR

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	payments; Central Bank Digital Currencies (CBDCs Neo-banks and fintech integration; Payment banks and small finance banks; API banking
Unit-III (CO3)	Technology Innovations in Banking-I: Artificial Intelligence and Machine Learning in credit scoring, fraud detection and customer service; Robotic Process Automation (RPA) in operations ;Blockchain applications: KYC, smart contracts, cross-border payments; Central Bank Digital Currency (CBDC)
Unit-IV (CO4)	Technology Innovations in Banking-II- Chatbots, robo-advisory, smart contracts Cryptocurrencies, Crowdfunding and other recent innovations in Fintech.; Framework for banks; KYC, AML, and CFT – technological interventions and compliance tools; Cloud computing and banking-as-a-service (BaaS)
Unit-V (CO5)	Data privacy and protection laws – Indian and global perspectives (e.g., GDPR); Operational and reputational risks in the digital environment. ESG (Environmental, Social, and Governance) in banking; Green banking and sustainable initiatives

* Other Learning Activities (for 60 hours) includes the following:

- End term Exam/ class tests/ case studies/ quiz/ PPTs/ and other assessments
- Value education classes
- Events/ Competitions/ Workshops/ Expert Lectures
- Vocational education/ training/ Value added Courses
- Problem Solving Exercises
- Demonstration Tasks
- Projects

Assessment Strategy

Tool	Marks
End Term Exam	70
Mid Term Exams	10
Presentations (Case studies / /Topics/Demonstrations)	5
Assignment (Project / Q& A / Events/ Competitions/ Workshops/ Expert Lectures Participation)	5
Attendance	10

Suggested Readings:

- **Indian Institute of Banking & Finance. (2024).** *Digital Banking*. Taxmann Publications Pvt. Ltd.
- **Indian Institute of Banking & Finance. (2024).** *Ethics in Banking*. Taxmann Publications Pvt. Ltd.
- **Albright, S. C., & Winston, W. L. (2020).** *Business Analytics: Data Analysis & Decision Making*. Cengage Learning.

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- **Kumar, U. D. (2017).** *Business Analytics: The Science of Data-Driven Decision Making.* Wiley India.
 - **Evans, J. R. (2019).** *Business Analytics: Methods, Models, and Decisions.* Pearson.
 - **Skinner, C. (2014).** *Digital Bank: Strategies to Launch or Become a Digital Bank.* Marshall Cavendish International.
 - **Gupta, P., & Tham, M. (2018).** *Fintech: The New DNA of Financial Services.* World Scientific Publishing.
 - **Chishti, S., & Barberis, J. (2016).** *The FINTECH Book: The Financial Technology Handbook for Investors, Entrepreneurs and Visionaries.* Wiley.
 - **Bhardwaj, A., & Jagannathan, V. (2021).** *AI and Analytics for Banking: Use Cases and Frameworks.* Wiley India.
 - **Kuo Chuen, D. L., & Deng, R. H. (Eds.). (2017).** *Handbook of Blockchain, Digital Finance, and Inclusion (Vol. 1 & 2).* Academic Press.
 - **Shanmugam, S. (2020).** *Cybersecurity in Banking: A Practical Guide.* Notion Press.

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	payments; Central Bank Digital Currencies (CBDCs Neo-banks and fintech integration; Payment banks and small finance banks; API banking
Unit-III (CO3)	Technology Innovations in Banking-I: Artificial Intelligence and Machine Learning in credit scoring, fraud detection and customer service; Robotic Process Automation (RPA) in operations ;Blockchain applications: KYC, smart contracts, cross-border payments; Central Bank Digital Currency (CBDC)
Unit-IV (CO4)	Technology Innovations in Banking-II- Chatbots, robo-advisory, smart contracts Cryptocurrencies, Crowdfunding and other recent innovations in Fintech.; Framework for banks; KYC, AML, and CFT – technological interventions and compliance tools; Cloud computing and banking-as-a-service (BaaS)
Unit-V (CO5)	Data privacy and protection laws – Indian and global perspectives (e.g., GDPR); Operational and reputational risks in the digital environment. ESG (Environmental, Social, and Governance) in banking; Green banking and sustainable initiatives

* Other Learning Activities (for 60 hours) includes the following:

- End term Exam/ class tests/ case studies/ quiz/ PPTs/ and other assessments
- Value education classes
- Events/ Competitions/ Workshops/ Expert Lectures
- Vocational education/ training/ Value added Courses
- Problem Solving Exercises
- Demonstration Tasks
- Projects

Assessment Strategy

Tool	Marks
End Term Exam	70
Mid Term Exams	10
Presentations (Case studies / /Topics/Demonstrations)	5
Assignment (Project / Q& A / Events/ Competitions/ Workshops/ Expert Lectures Participation)	5
Attendance	10

Suggested Readings:

- **Indian Institute of Banking & Finance. (2024).** *Digital Banking*. Taxmann Publications Pvt. Ltd.
- **Indian Institute of Banking & Finance. (2024).** *Ethics in Banking*. Taxmann Publications Pvt. Ltd.
- **Albright, S. C., & Winston, W. L. (2020).** *Business Analytics: Data Analysis & Decision Making*. Cengage Learning.

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- **Kumar, U. D. (2017).** *Business Analytics: The Science of Data-Driven Decision Making.* Wiley India.
 - **Evans, J. R. (2019).** *Business Analytics: Methods, Models, and Decisions.* Pearson.
 - **Skinner, C. (2014).** *Digital Bank: Strategies to Launch or Become a Digital Bank.* Marshall Cavendish International.
 - **Gupta, P., & Tham, M. (2018).** *Fintech: The New DNA of Financial Services.* World Scientific Publishing.
 - **Chishti, S., & Barberis, J. (2016).** *The FINTECH Book: The Financial Technology Handbook for Investors, Entrepreneurs and Visionaries.* Wiley.
 - **Bhardwaj, A., & Jagannathan, V. (2021).** *AI and Analytics for Banking: Use Cases and Frameworks.* Wiley India.
 - **Kuo Chuen, D. L., & Deng, R. H. (Eds.). (2017).** *Handbook of Blockchain, Digital Finance, and Inclusion (Vol. 1 & 2).* Academic Press.
 - **Shanmugam, S. (2020).** *Cybersecurity in Banking: A Practical Guide.* Notion Press.

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Course Title: Security Analysis & Portfolio Management**Course Credit: 4 (3-1-0)****Course No. 24PMBF07****Max. Marks: 100(30I+70E)****Course Objective:**

1. To understand investment types, market structure, and risk-return concepts.
2. To analyze securities using fundamental and technical analysis.
3. To learn valuation techniques for equity and debt instruments.
4. To construct investment portfolios using models like CAPM.
5. To evaluate and revise portfolios based on performance metrics.

Learning Outcomes: Students will be able to:

CO1: Understand the concept of financial markets, investment types, investor profiles, and risk-return dynamics.

CO2: Apply fundamental and technical analysis and interpret market efficiency theories.

CO3: Perform valuation of equity and debt instruments and understand basics of portfolio management.

CO4: Construct investment portfolios using modern portfolio theories and risk-return models.

CO5: Evaluate and revise portfolios using performance metrics and management strategies.

Course Content:

Unit / CO	Course Content
Unit-I (CO1)	What is a Market? Primary capital markets; secondary financial markets. Investment: Meaning, objectives, investment vs. speculation, types of investors, types of investments, Risk and Return – systematic and unsystematic risk, measurement of risk and return. The Asset Allocation decision - Individual investor life cycle.
Unit-II (CO2)	Investment Process; Fundamental Analysis: Economy, industry, company analysis. Technical Analysis: Tools, indicators, chart patterns, efficient market hypothesis. Alternative efficient market Hypotheses; Tests and results of EMH; Implications of efficient capital markets.
Unit-III (CO3)	Valuation of Equity Shares and Bonds, Dividend Discount Models, Yield Curve, Duration, Convexity; An introduction to Portfolio Management - Some background assumptions.
Unit-IV (CO4)	Portfolio Construction theory – Markowitz model, Sharpe single index model, Efficient frontier, Capital Market Line, Security Market Line, Capital Asset Pricing Model (CAPM), Arbitrage Pricing Theory (APT).
Unit-V (CO5)	Equity Valuation for Portfolio management strategies; Bond Valuation for Bond Portfolio Management Strategies; Portfolio Evaluation – Sharpe, Treynor, and Jensen's Alpha; Portfolio Revision Techniques and Strategies– Passive Management Strategies, and Active Management Strategies.

* Other Learning Activities (for 60 hours) includes the following:

- End term Exam/ class tests/ case studies/ quiz/ PPTs/ and other assessments
- Value education classes
- Events/ Competitions/ Workshops/ Expert Lectures
- Social/ community work
- Vocational education/ training/ Value added Courses
- Problem Solving Exercises
- Demonstration Tasks
- Projects

Assessment Strategy

Tool	Marks
End Term Exam	70
Mid Term Exams	10
Presentations (Project)	5
Assignment (Project / Problem Solving Exercises / Events/ Competitions/ Workshops/ Expert Lectures Participation)	5
Attendance	10

Suggested Readings:

- Pandian, P. (2020). *Security Analysis and Portfolio Management*. Vikas Publishing House.
- Singh, Y. P. (2022). *Investment Analysis and Portfolio Management*. Taxmann Publications.
- Avadhani, V. A. (2021). *Investment Management*. Himalaya Publishing House.
- Ranganatham, M., & Madhumathi, R. (2012). *Investment Analysis and Portfolio Management*. Pearson Education.
- Sharpe, W. F., Alexander, G. J., & Bailey, J. V. (1999). *Investments*. Prentice Hall.
- Khatri, D. (2010). *Investment Management and Security Analysis*. Macmillan India.

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Course Title: Financial Instruments

Course Credit: 4 (3-1-0)

Course No. 24PMBF08

Max. Marks: 100(30I+70E)

Course Objective:

1. To introduce classification and characteristics of financial instruments.
2. To study valuation of debt instruments and money market tools.
3. To analyze derivatives such as futures, options, and swaps.
4. To evaluate structured instruments like ABS, CDS, and MBS.
5. To understand regulatory and accounting aspects of instruments.

Learning Outcomes: Students will be able to:

CO1: Understand the types, features, and market roles of financial instruments, including equity, debt, and hybrid securities.

CO2: Analyze debt and money market instruments along with the basics of financial derivatives and their valuation.

CO3: Apply concepts of derivative instruments such as futures, options, and swaps for hedging and risk management.

CO4: Evaluate structured and innovative financial instruments, including securitized assets and credit derivatives.

CO5: Interpret the regulatory and accounting standards related to financial instruments and their disclosures.

Course Content:

Unit / CO	Course Content
Unit-I (CO1)	Introduction to Financial Instruments: Meaning, classification, and features of financial instruments; Role of financial instruments in financial markets; Primary vs. secondary market instruments; Equity shares, preference shares, and debentures; Hybrid instruments: Convertible debentures, warrants, etc.
Unit-II (CO2)	Debt and Money Market Instruments: Treasury bills, commercial papers, and certificates of deposit; Corporate bonds and government securities; Yield, maturity, and interest rate risk; Credit rating and valuation of debt instruments; Financial Derivatives –Meaning, types, uses and factors driving the growth of derivatives; Types of Traders.
Unit-III (CO3)	Derivative Instruments: Forwards and futures – concepts and pricing; Forward Contracts v/s Future Contracts. Options – call and put, payoff strategies; Swaps – interest rate swaps, currency swaps; Uses of derivatives in hedging and risk management.

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Unit-IV (CO4)	Innovative and Structured Financial Instruments: Securitization: Process, benefits, and risks; Mortgage-backed securities (MBS) and asset-backed securities (ABS); Credit default swaps (CDS) and collateralized debt obligations (CDO); Structured notes and hybrid instruments; Financial engineering and innovation in instruments.
Unit-V (CO5)	Regulatory and Accounting Aspects: Regulatory framework for financial instruments in India (SEBI, RBI, IRDAI); IFRS and Indian Accounting Standards (Ind AS) for financial instruments; Disclosures, classification, and measurement; Mark-to-market valuation and fair value accounting; Risk reporting and compliance.

* Other Learning Activities (for 60 hours) includes the following:

- End term Exam/ class tests/ case studies/ quiz/ PPTs/ and other assessments
- Value education classes
- Events/ Competitions/ Workshops/ Expert Lectures
- Social/ community work
- Vocational education/ training/ Value added Courses
- Problem Solving Exercises
- Demonstration Tasks
- Projects

Assessment Strategy

Tool	Marks
End Term Exam	70
Mid Term Exams	10
Presentations (Case studies / /Topics/Demonstrations)	5
Assignment (Project / Problem Solving Exercises / Events/ Competitions/ Workshops/ Expert Lectures Participation)	5
Attendance	10

Suggested Readings:

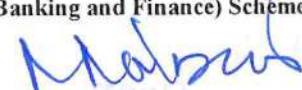
- **Singh, Y. P. (2022).** *Financial Instruments & Markets*. Taxmann Publications.
- **Pandian, P. (2020).** *Security Analysis and Portfolio Management*. Vikas Publishing House.
- **Avadhani, V. A. (2022).** *Investment and Securities Markets in India*. Himalaya Publishing House.
- **Sundaram, J., & Das, S. (2016).** *Derivatives: Principles and Practice*. McGraw Hill Education.

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- **Fabozzi, F. J. (2010).** *Bond Markets, Analysis, and Strategies*. Pearson.
- **Pathak, B. V. (2014).** *The Indian Financial System: Markets, Institutions and Services* (4th ed.). Pearson Education.
- **Bhole, L. M., & Mahakud, J. (2019).** *Financial Institutions and Markets: Structure, Growth and Innovations* (6th ed.). McGraw Hill.
- **Hull, J. C. (2022).** *Options, Futures, and Other Derivatives* (10th ed.). Pearson.
- **Chandra, P. (2021).** *Financial Management: Theory and Practice* (10th ed.). McGraw Hill.


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Course Title: Customer Relationship Management

Course Credit: 4 (3-1-0)

Course No. 24PMBF09

Max. Marks: 100(30I+70E)

Course Objectives

1. To provide a conceptual understanding of CRM and its evolution in the context of strategic marketing.
2. To explore the customer lifecycle and understand techniques for acquisition, retention, and relationship building.
3. To familiarize students with CRM strategies that enhance customer satisfaction, loyalty, and advocacy.
4. To introduce technological tools and platforms used in CRM, including software and automation solutions.
5. To equip learners with the ability to evaluate CRM performance and understand ethical and legal responsibilities in data management.

Learning Outcomes

After completing the course, students will be able to:

1. **CO1:** Describe the strategic importance of CRM in modern businesses and differentiate between operational and analytical CRM approaches.
2. **CO2:** Map customer journeys and apply lifecycle strategies using customer value metrics like CLTV, NPS, and RFM.
3. **CO3:** Design personalized CRM strategies for various customer segments to enhance engagement and service recovery.
4. **CO4:** Operate CRM software tools and demonstrate an understanding of AI-based CRM functions such as chatbots and recommendation systems.
5. **CO5:** Measure CRM effectiveness using key performance indicators (KPIs) and apply data privacy and ethical frameworks in CRM decision-making.

Course Content:

Unit / CO	Course Content
Unit-I (CO1)	Introduction to CRM : Definition of CRM , benefits of CRM, Strategic vs. tactical CRM, CRM vs. relationship marketing; The CRM value chain; Careers in CRM
Unit-II (CO2)	Customer Lifecycle and Relationship Marketing: Customer lifecycle- acquisition, retention, development; Customer value and profitability metrics: CLV, RFM; Customer satisfaction and loyalty measurement; Segmentation and targeting in CRM
Unit-III (CO3)	CRM Strategy and Customer Experience: Designing CRM strategies for B2B and B2C; Touchpoints and customer journey mapping; Complaint handling and service recovery; Customer advocacy and creating brand ambassadors; Social CRM and community engagement.
Unit-IV (CO4)	CRM Technology and Tools: Operational vs Analytical CRM; Popular CRM software: Salesforce, Zoho, HubSpot, etc.;Integration with ERP and marketing automation; AI in CRM: Chatbots, recommendation engines, sentiment analysis

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Unit-V (CO5)	Measuring CRM Effectiveness and Legal Aspects: CRM KPIs: retention, churn rate, acquisition cost; ROI of CRM initiatives; Data privacy, consent, and GDPR/Indian IT Act; Ethical issues: surveillance vs. customer trust
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* Other Learning Activities (for 60 hours) includes the following:

- End term Exam/ class tests/ case studies/ quiz/ PPTs/ and other assessments
- Value education classes
- Events/ Competitions/ Workshops/ Expert Lectures
- Social/ community work
- Vocational education/ training/ Value added Courses
- Problem Solving Exercises
- Demonstration Tasks
- Projects

Assessment Strategy

Tool	Marks
End Term Exam	70
Mid Term Exams	10
Presentations (Case studies / /Topics)	5
Assignment (Project / Q&A/Problem Solving Exercises / Events/ Competitions/ Workshops/ Expert Lectures Participation)	5
Attendance	10

Suggested Readings:

- **Kaushik, M. (2013).** *Customer Relationship Management*. McGraw Hill Education.
- **Shanmugasundaram, S. (2008).** *Customer Relationship Management*. Prentice Hall India.
- **Chadha, S. K. (2021).** *Customer Relationship Management*. Vikas Publishing House.
- **Peppers, D., & Rogers, M. (2017).** *Managing Customer Relationships: A Strategic Framework* (2nd ed.). Wiley.
- **Buttle, F., & Maklan, S. (2019).** *Customer Relationship Management: Concepts and Technologies* (4th ed.). Routledge.
- **Dyche, J. (2002).** *The CRM Handbook: A Business Guide to Customer Relationship Management*. Addison-Wesley.

Course Title: Financial Planning and Risk Management

Course Credit: 4 (3-1-0)

Course No. 24PMBF10

Max. Marks: 100(30I+70E)

Course Objective: This course will provide students with:

1. To define and categorize different types of financial risks.
2. To apply techniques to measure and determine risk.
3. To implement risk management process and financing methods.
4. To instill awareness of behavioral factors and digital tools influencing personal financial decisions.
5. To provide knowledge of tax planning, retirement planning, insurance, and contingency reserves

Learning Outcomes: Students will be able to:

CO1: Understand the nature, types, sources, and methods of handling risk in financial and business contexts.

CO2: Apply risk determination techniques to evaluate the relationship between risk and return under uncertainty.

CO3: Describe and implement the stages of the risk management process and its role in minimizing cost and enhancing societal welfare.

CO4: Evaluate the impact of behavioral biases and utilize digital tools and calculators for effective financial decision-making.

CO5: Apply tax-saving options, retirement planning methods, and emergency fund strategies for financial security.

Course Content:

Unit / CO	Course Content
Unit-I (CO1)	Introduction to Risk Management: Risk and Uncertainty, Types of Risk, Burden of Risk, Sources of Risk, Methods of handling Risk, Degree of Risk, Management of Risk
Unit-II (CO2)	Risk and Uncertainty Determination: Risk Vs Return dynamics, Methods of Risk determination; Risk Adjusted Discounted Rate, Certainty Equivalent Method, Sensitivity Techniques, Probability Technique, Standard Deviation Method, Coefficient of Variation Method, Decision Tree Analysis.
Unit-III (CO3)	Risk Management Process: Need, Objectives, Cost of Risk, Individual Risk Management, Loss exposures: Identification and Analysis, Objectives of Risk Management, Risk Management Techniques, Risk Financing Techniques.

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Unit-IV (CO4)	Financial Goal Setting : Types of financial goals: Short-term, Medium-term, Long-term; SMART goals in financial planning; Linking financial products with financial goals; Customized investment planning based on life stage
Unit-V (CO5)	Retirement Planning: Estimating retirement corpus using inflation-adjusted expenses Role of EPF, NPS, PPF, Mutual Funds in retirement planning SWP (Systematic Withdrawal Plan) vs Annuity plans; Retirement calculators (manual + Excel-based)

* Other Learning Activities (for 60 hours) includes the following:

- End term Exam/ class tests/ case studies/ quiz/ PPTs/ and other assessments
- Value education classes
- Events/ Competitions/ Workshops/ Expert Lectures
- Social/ community work
- Vocational education/ training/ Value added Courses
- Problem Solving Exercises
- Demonstration Tasks
- Projects

Assessment Strategy

Tool	Marks
End Term Exam	70
Mid Term Exams	10
Presentations (Case studies / /Topics/Demonstrations)	5
Assignment (Project / Q&A/Problem Solving Exercises / Events/ Competitions/ Workshops/ Expert Lectures Participation)	5
Attendance	10

Suggested Readings:

- Mishra, M. N. (2012). *Insurance: Principles and Practice*. S. Chand Publishing.
- Redja, G. E. (2017). *Risk Management and Insurance*. Vikas Publishing House.
- Rejda, G. E., & McNamara, M. J. (2020). *Principles of Risk Management and Insurance* (14th ed.). Pearson.
- Dorfman, M. S. (2007). *Introduction to Risk Management and Insurance* (9th ed.). Prentice Hall.
- Williams, C. A., Smith, M. L., & Young, P. C. (1998). *Risk Management and Insurance*. McGraw Hill.

Course Title: Applied Personal Finance Management

Course Credit: 2 (2-0-0)

Course No. 24PMBM02

Max. Marks: 100(30I+70E)

Course Objective:

1. To apply time value of money for personal finance decisions.
2. To compute various return metrics and growth rates.
3. To analyze EMIs and loan repayment schedules.
4. To calculate personal financial ratios for planning.
5. To use savings ratios and human life value in planning.

Learning Outcomes: Students will be able to:

CO1: Compute Time value of money.

CO2: Perform calculation of Returns and growth rate

CO3: Interpret EMI on loans and payment schedules.

CO4: Compute financial ratios.

CO5: Apply financial engineering in financial planning.

Course Content:

Unit / CO	Course Content
Unit-I (CO1)	Time Value of Money – Present Value, Future Value, PV & FV of a Lump Sum, PV and FV of Annuities. Application of TVM in loan comparison (e.g., personal loan vs. credit card debt)
Unit-II (CO2)	Returns – Nominal Rate, Effective Rate, Real Rate, Internal Rate of Return, Internal Rate of Return of Irregular Cash Flows, Compounded Annual Growth Rate.
Unit-III (CO3)	Loan – EMI, Floating vs fixed interest rates, Loan Repayment Schedules, Repayment with Varying Interest Rates, How credit scores (CIBIL) affect loan eligibility
Unit-IV (CO4)	Financial Ratios I– Net worth and its components, Liquidity Ratios, Debt to Income Ratio, Debt to Financial Assets, Debt to Total Assets.
Unit-V (CO5)	Savings Ratios & applications- Savings Ratio, Application of Financial Mathematics in Financial Planning Situations; Human Life Value, How emotions affect money decisions; SMART financial goals; How to link savings and investment to life goals

* Other Learning Activities (for 60 hours) includes the following:

- End term Exam/ class tests/ case studies/ quiz/ PPTs/ and other assessments
- Value education classes
- Events/ Competitions/ Workshops/ Expert Lectures
- Social/ community work

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- Vocational education/ training/ Value added Courses
- Problem Solving Exercises
- Demonstration Tasks
- Projects

Assessment Strategy

Tool	Marks
End Term Exam	70
Mid Term Exams	10
Presentations (Case studies)	5
Assignment (Project / Problem Solving Exercises)	5
Attendance	10

Suggested Readings:

- **Indian Institute of Banking & Finance. (2017).** *Introduction to Financial Planning* (4th ed.). Taxmann Publications.
- **Tripathi, V. (2022).** *Fundamentals of Investment*. Taxmann Publications.
- **Sinha, M. (2017).** *Financial Planning: A Ready Reckoner*. McGraw Hill Education.
- **Halan, M. (2018).** *Let's Talk Money: You've Worked Hard for It, Now Make It Work for You*. Harper Business.
- **Kapoor, J. R., Dlabay, L. R., & Hughes, R. J. (2020).** *Personal Finance* (13th ed.). Cengage Learning.
- **Keown, A. J. (2019).** *Personal Finance: Turning Money into Wealth* (8th ed.). Pearson.
- **Gitman, L. J., Joehnk, M. D., & Billingsley, R. S. (2015).** *Personal Financial Planning* (13th ed.). Cengage Learning.



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SEMESTER-IV

Course Title: Indian Knowledge System in Service Management

Course Credit: 2 (2-0-0)

Course No. 24PMBM03

Max. Marks: 100(30I+70E)

Course Objectives:

1. To understand the foundational principles of IKS and their relevance in the service-dominant economy.
2. To explore leadership and governance approaches in ancient India and their applications in service delivery.
3. To analyze ethical and cultural dimensions of service excellence based on Indian traditions.
4. To examine ancient Indian models of service businesses and their sustainable practices.
5. To apply IKS concepts in modern service management areas like wellness, hospitality, HR, and customer experience.

Learning Outcomes: Students will be able to:

CO1: Understand the foundational concepts of IKS and its philosophical relevance to service systems.

CO2: Evaluate service-oriented leadership models from Indian epics and ancient administrative systems.

CO3: Apply Indian ethical frameworks such as Nishkam Karma and Guru-Shishya parampara to build customer-centric cultures.

CO4: Assess traditional Indian business service models (guilds, merchant houses) and their sustainability practices.

CO5: Integrate IKS-based practices such as Ayurveda, Yoga, and mindful communication into modern service sectors.

Course Content

Unit / CO	Course Content
Unit-I (CO1)	Foundations of IKS for Service Philosophy: Meaning of IKS and its relevance to service management; Vedas, Upanishads, Bhagavad Gita as sources of service ethos Four Purusharthas (Dharma, Artha, Kama, Moksha) and holistic service worldview

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Unit-II (CO2)	Leadership and Governance in Indian Service Traditions: Leadership in Ramayana and Mahabharata: Seva Bhava (servant leadership) Kautilya's Arthashastra on service institutions and public welfare Decentralized service delivery in Panchayati Raj systems Women leadership in community services and healthcare (e.g., Ayurveda)
Unit-III (CO3)	Indian Ethics and Service Culture: Nishkam Karma and customer-first philosophy; Guru-Shishya tradition and lifelong customer relationships Role of meditation, mindfulness in service orientation
Unit-IV (CO4)	Indian Economic and Service Models: Indigenous service enterprises: Havelis, Kirana models, ancient trade routes Guilds (Shrenis) as service cooperatives; Temple economy and seva (voluntary service)
Unit-V (CO5)	Modern Applications of IKS in Service Sectors: Integration of Yoga, Ayurveda in hospitality, healthcare, wellness services; IKS-driven HRM: compassion, work-life balance, intrinsic motivation; ; Innovation through simplicity: Jugaad in rural and urban services

* Other Learning Activities (for 30 hours) includes the following:

- End term Exam/ class tests/ case studies/ quiz/ PPTs/ and other assessments
- Value education classes
- Events/ Competitions/ Workshops/ Expert Lectures
- Social/ community work
- Vocational education/ training/ Value added Courses
- Problem Solving Exercises
- Demonstration Tasks
- Projects

Assessment Strategy

Tool	Marks
End Term Exam	70
Mid Term Exams	10
Presentations	5
Assignment	5
Attendance	10


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Suggested Readings:

Books

1. "Essence of Indian Knowledge Tradition" – AICTE Recommended Text
2. "Kautilya's Arthashastra" – Penguin Translation by L.N. Rangarajan
3. "Bhagavad Gita for Managers" – Radhakrishnan Pillai
4. "Indian Ethos and Values in Management" – N.M. Khandelwal
5. "Indian Psychology: Concepts and Applications" – K. Ramakrishna Rao


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Course Title: Human Values and Business Ethics

Course Credit: 2 (2-0-0)

Course No. 24PMBV02

Max. Marks: 100(30I+70E)

Course Objective:

To imbibe the moral values and ethics in students to make them responsible and compassionate global citizens.

Learning Outcomes:

After the completion of course, students will be able to:

CO1: Understand need and importance of ethics and values in doing business

CO2: Analyse the nature of ethical issues

CO3: Develop a capacity for ethical reasoning and to apply them in Organization contexts

CO4: Understand essence of ethics in functional areas if an organization

CO5: Understand the role of corporate governance and corporate social responsibility in promoting ethics and values for a business

Course Content:

Unit / CO	Course Content
Unit-I (CO1)	Ethics: Meaning and nature of Ethics, Meaning and Nature of Moral and values, Types of Ethics, Importance of ethics in business.
Unit-II (CO2)	Factors influencing business ethics, Managing codes of ethics, ethics committees, ethics training programs and laws enforcing ethical conduct.
Unit-III (CO3)	Ethics in marketing, Process relative ethics, product relative ethics, competition relative ethics; Ethics in finance and accounting, investment decisions, disclosure norms, insider trading norms. Ethics in production and operations Management.
Unit-IV (CO4)	Ethics in global business, issues relating to negotiations and providing access to less developed countries, avoiding sanctions, protection of intellectual Properties, gender inclusivity
Unit-V (CO5)	Corporate Governance and business ethics, roots of unethical behaviour, unethical issues; Corporate Social Responsibility (CSR): Meaning, scope, Social responsibility and Indian corporations.

*Pedagogical Tools and Other Learning Activities (for 30 hours) includes the following:

- End term Exam/ class tests/
- case studies
- PPTs/ and other assessments
- Value education classes
- Events/ Competitions/ Workshops/ Expert Lecture
- Life skills-based education
- Social/ community work

Assessment Strategy

Tool	Marks
End Term Exam	70
Mid Term Exams	10
Presentations (Case studies)	5
Assignment	5
Attendance	10

Suggested Readings:

1. New Approaches in Ethics for the Caring Professions: Taking Account of Change for Caring Professions 2005 Edition by Richard Hugman, Publisher: Red Globe Press; 2005 edition (9 July 2018)
2. Rethinking Values and Ethics in Social Work Kindle Edition by Richard Hugman, Jan Carter Red Globe Press
3. Professional Ethics and Human Values Paperback – 2015 by A. Alavudeen , R. Kalil Rahman, M. Jayakumaran , Laxmi Publications
4. A Foundation Course in Human Values and Professional Ethics Paperback by R.R.Gaur , R. Sangal , G.P. Bagaria , Excel Books
5. Living Issues in Philosophy by Titus, Smith and Nolan Publisher: Oxford University Press, New York.

Foundation of Ethics and Management by B P Banerjee Publisher: Excel Books


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Course Title: Dissertation

Course No. 24PMBS03

Course Credit: 4 (0-0-4)

Max. Marks: 100(70I+30E)

Course Objective:

1. To identify and investigate a real-world business problem.
2. To conduct a thorough literature review.
3. To design and implement appropriate research methodology.
4. To analyze data and draw meaningful conclusions.
5. To present research findings through a formal dissertation.

Course Outcomes

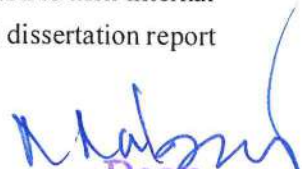
After successful completion of the dissertation, the student will be able to:

1. **CO1: Identify and formulate a relevant research problem** using appropriate theoretical and contextual frameworks.
2. **CO2: Review and synthesize existing literature** to establish research gaps and construct a conceptual or analytical foundation for the study.
3. **CO3: Apply suitable research methodologies** (qualitative, quantitative, or mixed methods) to collect and analyze primary or secondary data effectively.
4. **CO4: Draw valid conclusions and recommendations** based on data interpretation and relate findings to practical and policy implications.
5. **CO5: Present research work professionally** through a structured dissertation report and oral defense, demonstrating ethical standards, academic writing, and communication skills.

As part of this course, each student will undertake a dissertation project relevant to their area of academic or professional interest, preferably linked to their ongoing work or domain expertise. The project should involve identification of a real-world problem, review of literature, formulation of research objectives, data collection and analysis, and drawing of practical inferences or recommendations.

Each student will be assigned a faculty supervisor who will provide continuous academic guidance throughout the research period. Students are required to maintain regular contact with their supervisors and incorporate feedback during the course of their work.

All the students will submit/ discuss updates related to their Dissertation to their internal faculty guide every week. Students are expected to submit their final dissertation report 15 days prior to the last teaching day of final semester.


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Assessment Strategy

Tool	Marks
End Term Viva	30
Mid Term Viva	10
Presentations (Dissertation)	10
Report	40 (20 Mid+20 Final)
Attendance	10


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Course Title: OJT – 2

Course Credit: 14 (0-0-14)

Course No. 24PMBS04

Max. Marks: 350(245I+105E)

Course Objective: On-the-job training (OJT) offers students several valuable learning opportunities that go beyond theoretical knowledge. This will help students in the following:

1. To apply classroom learning in real-world settings.
2. To develop professional workplace behavior and ethics.
3. To build communication, teamwork, and leadership skills.
4. To receive constructive feedback for performance improvement.
5. To enhance employability through hands-on experience.

Course Outcomes for OJT

Student will be able to:

1. **CO1:** Demonstrate practical understanding of personal banking and customer service.
2. **CO2:** Apply theoretical knowledge to real-life banking operations
3. **CO3:** Observe and understand regulatory compliance practices in branch operations.
4. **CO4:** Use digital banking tools and platforms such as core banking systems, internet banking interfaces, and payment systems (UPI, NEFT, IMPS).
5. **CO5:** Exhibit professional behavior, workplace communication, and ethics in a customer-facing service environment.

Student will undergo On the Job training at Industrial partner in Personal Banking & Customer Service . At the end student will submit a Report of their learning .

All the students will submit their OJT Reports within a decided time-frame. Each student will be attached with one internal faculty guide, with whom they shall be in continuous touch during the period.

Assessment Strategy

Tool	Marks
End Term Viva	105
Monthly Viva/ OJT Performance	70 (17.5+ 17.5+ 17.5+ 17.5)
Presentations (Dissertation)	30
Report	40 (20 Mid+20 Final)
Attendance	105


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There is a typo - error in the month in case of Dissertation (24 PMB 503). It is to be university

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Course Title: Dissertation

Course No. 24PMBS03

Course Credit: 4 (0-0-4)

Max. Marks: 100(70I+30E)

Course Objective:

1. To identify and investigate a real-world business problem.
2. To conduct a thorough literature review.
3. To design and implement appropriate research methodology.
4. To analyze data and draw meaningful conclusions.
5. To present research findings through a formal dissertation.

Course Outcomes

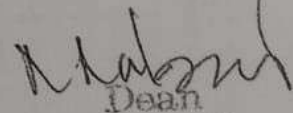
After successful completion of the dissertation, the student will be able to:

1. **CO1: Identify and formulate a relevant research problem** using appropriate theoretical and contextual frameworks.
2. **CO2: Review and synthesize existing literature** to establish research gaps and construct a conceptual or analytical foundation for the study.
3. **CO3: Apply suitable research methodologies** (qualitative, quantitative, or mixed methods) to collect and analyze primary or secondary data effectively.
4. **CO4: Draw valid conclusions and recommendations** based on data interpretation and relate findings to practical and policy implications.
5. **CO5: Present research work professionally** through a structured dissertation report and oral defense, demonstrating ethical standards, academic writing, and communication skills.

As part of this course, each student will undertake a dissertation project relevant to their area of academic or professional interest, preferably linked to their ongoing work or domain expertise. The project should involve identification of a real-world problem, review of literature, formulation of research objectives, data collection and analysis, and drawing of practical inferences or recommendations.

Each student will be assigned a faculty supervisor who will provide continuous academic guidance throughout the research period. Students are required to maintain regular contact with their supervisors and incorporate feedback during the course of their work.

All the students will submit/ discuss updates related to their Dissertation to their internal faculty guide every week. Students are expected to submit their final dissertation report 15 days prior to the last teaching day of final semester.


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