

Roll No.....

**Department of Management
School of Management and Business Studies
Jamia Hamdard**

**MBA(G) –IV Semester, APR-MAY 2018 EXAM
Wealth Management (MBA-GE-FM-09)**

Time:3hrs

Maximum Marks:75

Write your roll no immediately on top on receipt of this paper.

Q1. What is meant by Wealth management? How is it related to financial planning? Discuss the steps involved in financial planning process. (5+3+7=15 Marks)

Q2. What are the different assets classes? Discuss the role of different assets classes in wealth management process? (4+11=15 Marks)

Q3.Explain the following terms with respect to wealth management: (3*5=15 Marks)

(a) Financial Plan; (b) Systematic Investment Plan (SIP); (c) Goal based financial plan;
(d) Financial Blood test report; (e) Systematic transfer plan (STP)

Q4. What do you mean by risk profiling and asset allocation ? What are the different types of asset allocations? (6+9=15 Marks)

Q5. Discuss the different gold investment routes? (15 Marks)

Q6. Briefly explain the following terms: (5+5+5=15 Marks)

(i) Derivatives (ii) Mutual Fund (iii) Venture Capital

Q7 - Briefly discuss the following terms/concepts: (5+5+5 =15 Marks)

(i) Sharpe Ratio (ii) Treynor's Ratio (iii) Jensen's Alpha

Q8. What do you mean by capital gains ? Explain how to calculate capital gains for income tax purpose according to Income Tax Act-1961? (5+10=15 Marks)
