NSE Academy

Financial Planning, Banking & Investment Management

Course Fees: Rs.5,499/-+ Taxes

- 10 Certificate Courses
- 65+* Hours of Digital Content
  *Banking Fundamental from SBI
- Access to content on Digital Platform

About Program

Financial Planning, Banking and Investment Management course will help hone your skills in Financial Planning, Investment and Wealth Management, Financial Instruments & Communication skills. This course will empower the learners with knowledge about key market fundamentals, technical analysis, wealth management, banking and derivatives. All modules are designed for easy understanding of the subject and help the learners make prudent decisions regarding financial product selection (Stock, Bonds, Mutual funds etc.) Wealth Planning and Analysis.

10 Courses with 65+ Hours of Digital Content

#	Course	Duration
1	Behavioural Finance	01 Hour
2	Financial Markets Beginners Module	03 Hours
3	Banking Fundamentals course by SBI	05 Hours
4	Financial Planning	06 Hours
5	Wealth Management	20 Hours
6	Investment Analysis and Portfolio Management	3.5 Hour
7	Financial Statements	04 Hours
8	Financial Derivatives	20 Hours
9	Introduction to Technical Analysis	06 Hours
10	Basics of Exchange Traded Funds	30 Min

1 Behavioural Finance

01 Hour

Financial investments and wealth creation is a hot topic among all types of investors big or small. This short course discusses various aspects of behavioral finance and decision making. This course is suitable for investors who want to take prudent decisions in their wealth creation journey. No specific knowledge of financial terms is needed. The course content is suitable for beginners. The course is also ideal for finance and economics students to get a firm ground on essential behavioral finance concepts to study the subject further.

Course Outline

- Fundamentals of Behavioural Finance
- Introduction to Course
- What is behavioural finance?
  How is it different from traditional finance?
- What are different types of biases that exist in investor's behaviour?
- How to mitigate risks due to behavioural biases while investing?
- How does endowment effect influence investors in decision making?
- Can Artificial Intelligence and machine learning take better financial decisions?
- Can Artificial Intelligence help in taking rational investment decisions?
- Will AI/ML based investments/trading dominate the future?
- Will AI/ML replace the investment thesis for investors in start-up?

Learning Outcomes

- Role of Human Behaviour in financial decision making.
- Different types of human biases and their impact on investment strategies.
- How to make rational investment decisions?
- What are latest technology trends (such as AI/ML) in investment strategies?

2

Financial Markets Beginners Module

03 Hours

This course explains investment strategies and performance evaluation. This will help you to manage your wealth and plan your portfolio. It will also help in tax and estate planning and give various financial planning strategies. This will help you allocate wealth through a systematic understanding of risk and reward and planning specific goals.

Course Outline

- Investment Basics
- Primary Markets
- Secondary Markets
- Mutual Funds
- Concepts and Modes of Analysis
- Securities
- Derivatives
- Depository
- Ratio Analysis
- Miscellaneous

3 Banking Fundamentals

course by SBI

05 Hours

Today, banking has undergone a sea change in terms of products, services, delivery platforms, customer education & expectations. Notwithstanding this rapid and sometimes overwhelming change ushered in through technology, an individual who would like to pursue a career in banking needs to understand the fundamentals of banking. The course combines the principles of banking with real-life application.

Course Outline

- Fundamentals of Banking
- Compliance and Customer Service
- Stressed Assets Management
- Functions of Bank
- Digital Banking

4 Financial Planning

06 Hours

This course helps you to understand your financial goals and assists in growing, managing, and protecting wealth. The course also helps in understanding various asset classes, and portfolio classification based upon the proportion of various asset classes. Essentially, it helps you be in control of your income, expenses and investments such that you can manage your money and achieve your goals. The importance of personal financial planning cannot be ignored. It is not just about increasing your savings and reducing your expenses.

Course Outline

- Introduction to Financial Planning
- Model Portfolios: Portfolio maintenance and rebalancing
- Performance Attribution: Analyzing portfolio according to the asset class and the markets
- Risk Profiling: Classification of clients based on the Risk-return principle
- Risk Adjusted Return: 'Risk Adjusted Return' measures such as Sharpe Ratio, Treynor Ratio etc.

5 Wealth Management

20 Hours

This course explains investment strategies and performance evaluation. It will help you to manage your wealth and plan your portfolio. It will also help in tax and estate planning and give various financial planning strategies. This will help you allocate wealth through a systematic understanding of risk and reward and planning specific goals.

Course Outline

- Introduction to Financial Planning
- Asset Classes
- Financial Planning Tools
- Asset Allocation
- Modern Portfolio Theory
- Measuring Risk and Return
- Elements of the Financial Plan
- Tax Planning
- Customer Relationship Management

6 Investment Analysis and Portfolio Management

3.5 Hours

Investments are common across all investors from the individuals to the fund managers and institutions. However, analysis and investments based on such analysis is carried out by trained managers and informed investors. This course helps you understand all types of investments and analyze them with a need to invest effectively and efficiently. It covers all investments including equity, debt, and derivatives. Investing in markets that are not in the same efficiency level, analyzing individual investments and handling portfolios are some of the skills that this course covers.

Course Outline

- Objectives of Investment Decisions
- Financial markets
- Capital market Efficiency
- Fixed Income Securities
- Capital market Efficiency
- Financial Analysis and Evaluation
- Modern Portfolio Theory
- Valuation of Derivatives
- Investment Management

7 Financial Statements

04 Hours

This course helps in understanding the fundamentals of the company. Understanding them from the financial statements along with the reports published in the annual reports is always a challenge. There are a plethora of things related to the figures in financial statements and makes it difficult for the investor to analyze. This course helps in understanding as to what the financial statement comprises of and what should an investor choose for his analysis. By completing this course, you can evaluate the overall health of any company, business value along with understanding companies' future risks and potential.

Course Outline

- Profit & Loss (P&L) Statement: The components of a P&L Statement
- Cash Flow Statement: The concept of a Cash Flow Statement and its break-down into Financing, Investing and Operational Cash flows
- Statement - measures of profitability, and items of expense.
- Balance Sheet: A detailed discussion on various components of a Balance Sheet, such as Current Assets, Owner's Equity, Contingent Assets & Liabilities etc

8 Financial Derivatives

20 Hours

This course aims at providing an in-depth knowledge about derivatives. This course covers all types of derivatives including financial, interest rate, currency and commodity derivatives and all types of derivative products. This covers advanced derivatives and regulations related to derivatives. Various advanced derivatives and strategies for trading and pricing derivatives are also covered. This gives a knowledge of all derivatives.

Course Outline

- Introduction
- Application of Derivatives
- Forwards
- Futures
- FRAs
- SWAPS
- Options
- Structured Products

9

Introduction to Technical Analysis

06 Hours

Technical analysis is all about analysis of markets and market movements. Technical analysis believes that markets follow a pattern and investing on the basis of this pattern is the most efficient method of investing. There are some principles and theories to this, and the course covers all about the same. Technical analysis is led by charts and trends and their interpretation to predict markets. This course will give you an in-depth knowledge of all these aspects, helping you analyze markets with expertise.

Course Outline

- An overview of Technical Analysis
- Types of charts and their features
- Theories underlying Technical analysis
- Trend Line/Channel and its Interpretation

10 The Basics of Exchange Traded Funds

30 minutes

After going through the entire course, a user should be able to understand:

- The Various styles of investing
- The basics of index fund
- Know about the basics of mutual fund
- Learn the relevant investment concepts
- Understand the way in which ETF works
- Know about the structure, benefits, and risk of ETF

Course Outline

- Active and passive styles of
- investing Basics of Index Funds
- Exchange Traded Funds
- Basics of mutual fund
- Relevant Investment concepts
- Types of ETFs
- Stock Market Index
- How ETFs works
- ETF Structure

How to Activate the Course?

Step 01

Click on the payment link received in the email.

Step 02

Get redirected to the payment gateway and complete the payment process.

Step 03

Receive a Payment acknowledgement email.

Step 04

Within 48 working hours of making the payment, you shall receive an email from "NSE Academy" stating the link, login credentials and course code to access the courses in the NSE Knowledge Hub platform

Step 05

Login to NSE Knowledge Hub with your credentials and start consuming the courses as per convenience

Step 06

Post completion of the courses you shall receive an email to download the certificate from "NSE Knowledge Hub"

Contact Details

Counsellor: +91 9028420522 | +91 7385111639

Email: gen_pdp@nse.co.in

Refund Policy

- Registration Fees paid by the candidate shall not be refunded under any circumstances after the login id of the application has been shared to candidates.

- In case the registered candidates wishes to cancel the registration for the Certificate Programs, the candidate shall intimate NSE Academy via a written request/Email request minimum 2 working days prior to the commencement of the Certificate Programs or sharing the login id of the application. Once approved the candidate will be refunded 90% of the total course fees paid for the respective Certificate Programs.