NSE Academy

CAWA

International Certificate Partner

DEAKINCo. | DEAKIN UNIVERSITY

ADVANCED PROGRAM IN FINANCE & WEALTH MANAGEMENT

Duration

3 months

FROM THE CEO'S DESK -
NSE Academy Ltd

At NSE Academy we are delighted to partner with OAWA Investment Education as part of our mission of bringing new learning in the financial education space and creating future ready talent pool for the industry. While India is witnessing an unprecedented era of wealth creation, still a large segment of the society is unaware about the right approach to achieve financial freedom and also do not have access to professional advice in matters of personal money management.

Professional wealth management assists investors and savers in planning personal financial goals, aligning investment opportunities and risk management of the portfolio. There is an increasing demand for professional financial advice and it is gradually becoming a preferred career choice of young graduates as well as experienced professionals. We are happy to support OAWA Investment Education's efforts in creating the next generation of responsible and trustworthy wealth managers.

Abhilash Misra

PROGRAM OVERVIEW

NSE Academy & OAWA's live online ***Advanced Program in Finance & Wealth Management*** equips you to risk profile, plan and build portfolios along with the necessary knowledge and skillset for a career as a financial advisor.

The program also hones your professional, persuasive and interpersonal communication skills, certified by DeakinCo. (Backed by Deakin University, Australia)

LEARNING METHODOLOGY

Unique combination of Live classes and Systematic Learning Pathway of NSE Academy, OAWA and DeakinCo (Australia)

Month	Mode	# of Modules	Total Hours
Month 1	Live Classes	7 Modules	~12 hours
Month 2	Live Classes Self Paced	6 Modules 1 Module	~12 hours ~1 hour
Month 3	Live Classes Self Paced	5 Modules 2 Modules	~10 hours ~11 hours

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WHO CAN JOIN?

- Graduates & Post-Graduates
- CA, ICWAI, CS, MBA
- Professionals looking for a career shift or upskilling
- Financial advisors and insurance agents
- Homemakers looking for a second career or for managing family assets

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LEARNING OBJECTIVES

- Learn the benefits of savings and investments
- Demystify key macroeconomic variables
- How to value various debt and equity instruments?
- Create investment portfolios and assess risk
- How to prepare financial plans & estate planning
- How to acquire and manage a client's portfolio?
- Ways to analyse various assets and use investment tools
- Effective workplace communication

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MODULES

Month 1

- **Introduction to Savings & Investment**
  - Savings, Investment & Speculation
  - How to convert savings into investment for long-term wealth creation
- **The Power of Compounding**
  - Its impact on investments and wealth creation
- **How Macros impact the Markets**
  - Economic Growth
  - Inflation
  - Policy Actions
- **Where to Invest? Let's talk about Asset classes**
  - Equity as an asset class
  - Debt as an asset class
- **Importance of Asset Allocation**
  - Practical nuances of asset allocation
- **Investing through Mutual Funds**
  - Types of Mutual Fund
  - Use of MF as an investment tool
  - How to select a Mutual Fund
- **Creating your MF investment portfolio**
  - Selection of debt and equity schemes
  - Monitoring the portfolio
  - How to evaluate the performance of a portfolio
  - How to calculate investment returns

MODULES

Month 2

- **How to value a Bond**
  - The practical approach
- **How to value an Equity share?**
  - Using bottom-up and top-down methodology
- **Diversification and Portfolio Risk** *Digital Badge - NSE Knowledge Hub* *Self-paced*
  - Explain what is diversification of portfolio
  - Explain portfolio risk
- **Strategies to minimise portfolio risk**
  - Strategies for debt investments
  - Strategies for equity investments
- **Can gold and real estate have a place in an investor's portfolio?**
  - Ways to take exposure in gold
  - Ways to take exposure in real estate
- **Insurance and Wealth Protection**
  - Life Insurance
  - Health Insurance
  - Vehicle Insurance
  - Home Insurance
- **A comprehensive portfolio**
  - Constructing a comprehensive portfolio
  - Tracking a portfolio
  - Evaluating performance of a portfolio
  - Rebalancing a portfolio

MODULES

Month 3

- **Financial Planning** *NSE Knowledge Hub* *Self-paced*
    - Risk Profiling
    - Model Portfolio
    - Portfolio maintenance & rebalancing
    - Risk-adjusted return
    - Performance attribution
- **Estate Planning**
    - Inter-generational wealth management
- **How to Acquire and Manage a Client?**
    - Client Connect Protocol
    - Client Retention Strategy
- **Effective Communication in the workplace** *Certified by DeakinCo* *Self-paced*
    - Professional communication
    - Persuasive communication
    - Interpersonal communication
- **Acing Job Interviews**
    - Key traits needed to start a career as a financial advisor
- **Career options as a Financial Advisor**
    - As an Employee
    - As an Entrepreneur
- **Handling Client meetings**
    - **The practical approach**

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TESTIMONIALS

The Wealth Management program conducted by the OAWA team is an excellent course, diverse in subjects covering every aspect of the financial world. Excellent coaches, experienced managers giving lectures and practical explanations, and interactive sessions made it very easy. Weekly assessments and quizzes were quite engaging and interesting. I would recommend this course to anyone planning a career in Wealth Management

Babita Malhotra (Financial Advisor)

I joined OAWA Wealth management course with the learning mindset about various markets, how they work and what economic factors affect which industry and asset class. I feel so accomplished by learning the art of reasoning how and why!!

Chaitanya Agarwal (CA)

“This program in Wealth Management with OAWA has been an enriching learning experience for me. The program curriculum has been designed very well, and all the topics are taught by industry experts who, with their immense experience in the financial world, make the learning experience enjoyable and interesting...Kudos to the entire OAWA Team.”

Nimesh Nair (Mirae Asset MF)

WHY US?

- Placement assistance*
- Learn the practical way from specialists and industry practitioners
- The pedagogy is a blend of fundamental, technical, and workplace skills
- We simplify financial jargons

*Offered by OAWA

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MEET THE FACULTY

Jitender Kumar
ICAI,IFIM,NMIMS

Prof Makarand Bhopatkar CFA
ADIA-UAE,SP JainGlobal

Prof V Rajamanuri
NMIMS,NISM

Om Ahuja
Ex Brigade Group,JLL, ABN Amro,
Merrill Lynch

Dr Shanti Suresh
SIES,Mumbai

Dr Amit Bagga
SP Jain,MDI,IIFT

Joydeep Sen
Ex- BNP Paribas

Dr Tejinder Singh Rawal
M.Com.M.A.(Economics),M.A.(Public Administration),MA(Urdu),MA(English lit.)
L.B.,FCA,DISA,CISA,CISM,PhD(Tax)

Dr Satish Shrivastav
NADT,Tufts,Boston,
Harvard,Stanford

ADVISORY BOARD

NILESH SHAH

Nilesh Shah is the Group President & Managing Director of Kotak Mahindra Asset Management Co. Ltd. He is also a part-time member of the Prime Ministers Economic Advisory Council (PMEAC). He has also held the position of chairman of the Association of Mutual Funds India (AMFI). He has close to 3 decades of experience in capital markets and market-related investment, having managed funds across equity, fixed income securities and real estate for local and global investors.

In his previous assignments, Nilesh has held leadership roles with Axis Capital, ICICI Prudential Asset Management, Franklin Templeton and ICICI Securities. Mr Shah is a gold medallist Chartered Accountant and a merit ranking Cost Accountant. He has also co-authored a book on Financial Planning called “A Direct Take.”

ADVISORY BOARD

PROF. B.B CHAKRABARTI

Prof Binay Bhushan Chakrabarti is a former Professor of Finance at IIM Calcutta and ex- Director-in-charge of IIM Ranchi. He has worked as a member of the RBI's committee on Financial Benchmarks and the Advisory Committee of the Risk Management Institute of the National University of Singapore. He is a Mechanical Engineer from Jadavpur University, Calcutta (Gold medallist), PGDM from IIMCalcutta (Goldmedallist), Cost Accountant from the Institute of Cost Accountants of India, and Ph. D in Economics from Jadavpur University, Calcutta.

He has worked in the industry for 24 years, primarily in the manufacturing and financial services sector in GKW, Metal Box, Nagarjuna Group, Keventer, and NICCO-UCO as President, General Manager. Apart from teaching at IIM Calcutta, he has been a visiting professor at IIM Ahmedabad and other IIMs, including CFVG, Vietnam, ESCP Paris, National University of Singapore, Asian Institute of Technology, Bangkok, Reims Business School, etc.

ADVISORY BOARD

DR. KAVITA SHARMA

Dr Kavita Sharma retired as the president of South Asian University, New Delhi. Before this, she was a professor at Hindu College, Delhi University, for 37 years, during which she also served as principal for ten years. Dr Sharma served as the Director of India International Centre, New Delhi.

She is a life member of several prestigious associations and institutes, including the Indian Association of Canadian Studies, Indian Law Institute, Association of Comparative Literature, and Indian History Congress.

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NAVNEET MUNOT

Navneet Munot is the MD & CEO of HDFC Asset Management Company Limited, a joint venture of HDFC Ltd. with abrdn Investment Management Limited. He joined the firm in February 2021. Navneet has 28 years of rich experience in Financial Markets.

Prior to joining HDFC AMC, he was the Executive Director and Chief Investment Officer of SBI Funds Management Private Limited. Navneet was a key member of the executive committee and was responsible for overseeing investments worth over $ 150 billion across various asset classes in mutual funds and segregated accounts. Navneet was a Director on the board of SBI Pension Funds (P) Limited.

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ABOUT OAWA

OAWA Investment Education (India's 1st finance-focused EdTech platform) imparts knowledge on finance, investments & wealth. OAWA is on a mission to "inculcate financial literacy amongst young adults as an income-generating tool".

OAWA is managed and advised by market leaders from HDFC MF, Kotak MF, Invesco MF, Lehman Brothers, Deutsche Bank, and alumni from IIM Calcutta and Bangalore.

Sujoy Das

Vikram Sengupta

Sreeja Mukherjee

Trina Cheemalapati

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MESSAGE FROM THE FOUNDERS - OAWA

We are on a mission to serve as a platform to help learners expand their knowledge of finance and investments through relevant, practical and simple-to-follow learning pedagogy. We welcome candidates from across the country to learn from the country's acclaimed professionals.

NSE Academy & OAWA's Co-certified Advanced Program in Finance & Wealth Advisory is the first of its kind with a unique blend of fundamental knowledge & practical application. The self-learning module on "Effective Communication in the Workplace" by Deakin Co (The executive education arm of Deakin University, Australia) delivers the sought-after soft skill needed in today's time. Acclaimed academicians and renowned industry professionals will conduct live virtual classes. This Program is curated to help learners sharpen their skills and make it in today's world. The teaching methods blend the best of the conventional world of learning and the new-age internet learning tools.

We have intertwined several decades of learning from the world of investments, finance and wealth into this Program. We welcome you all to go through the details in the brochure and enrol for the Program.

An exciting journey awaits in the virtual classroom.

ABOUT NSE ACADEMY

NSE Academy Ltd. is a wholly-owned subsidiary of the National Stock Exchange of India Ltd. (NSEIL). NSE Academy enables the next generation of BFSI and FinTech professionals with industry-aligned skills through capacity building programs and certification courses, powered by an online examination and certification system.

The courses are well-researched and carefully crafted with inputs from the industry professional. NSE Academy works closely with reputed universities and institutions across India in building a competent workforce for the future of BFSI and FinTech.

NSE Academy also promotes financial literacy as an essential life skill among youngsters - a contribution towards financial inclusion and wellbeing.

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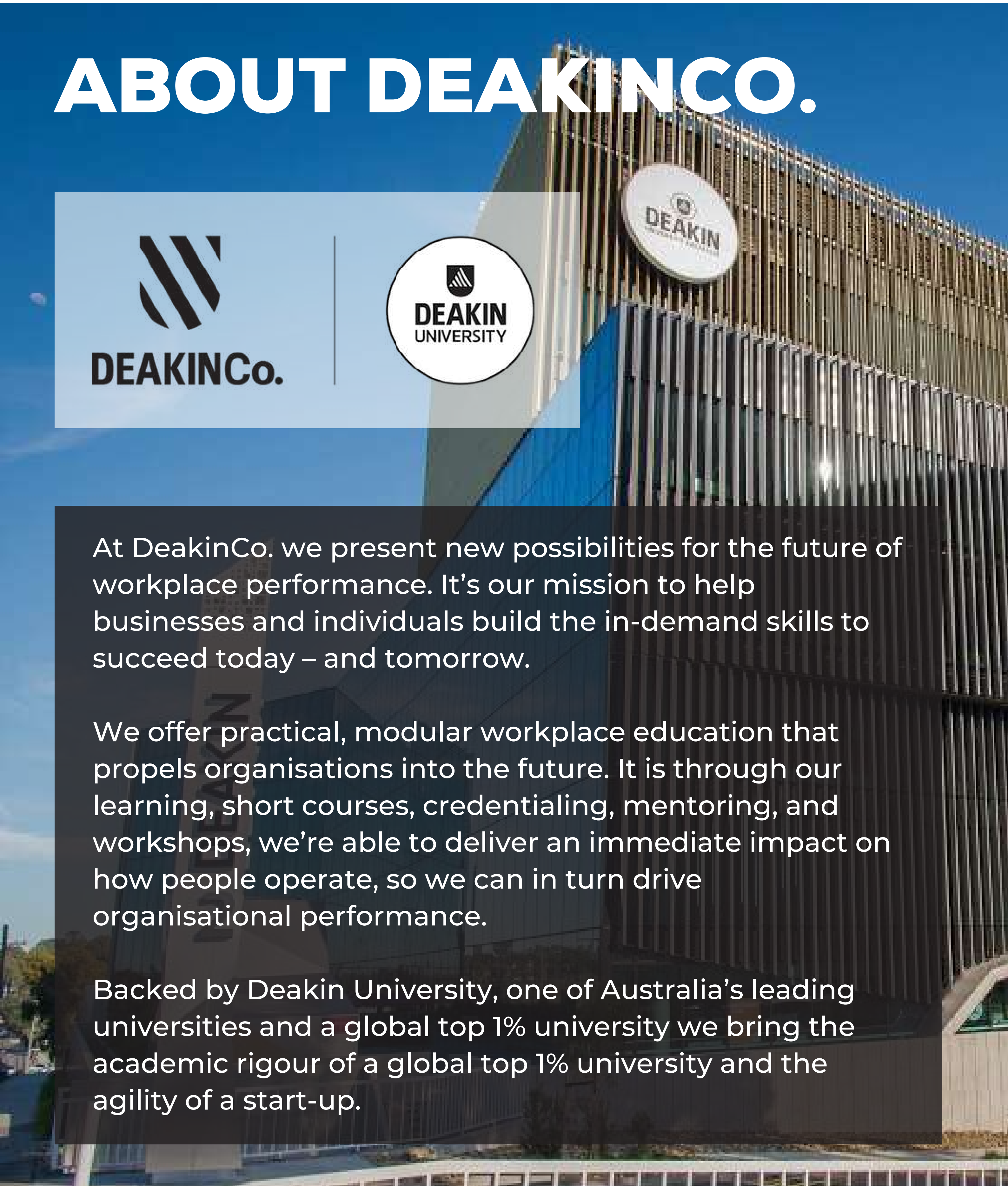
ABOUT DEAKINCO.



DEAKINCo. | DEAKIN UNIVERSITY

At DeakinCo. we present new possibilities for the future of workplace performance. It's our mission to help businesses and individuals build the in-demand skills to succeed today – and tomorrow.

We offer practical, modular workplace education that propels organisations into the future. It is through our learning, short courses, credentialing, mentoring, and workshops, we're able to deliver an immediate impact on how people operate, so we can in turn drive organisational performance.

Backed by Deakin University, one of Australia's leading universities and a global top 1% university we bring the academic rigour of a global top 1% university and the agility of a start-up.

SCHEDULE & FEES

Duration	3 months
Commencement	Please refer website
Fees (including 18% GST)	Rs 5,000/- (Registration Fees) Rs 70,000/-* (Program Fees)

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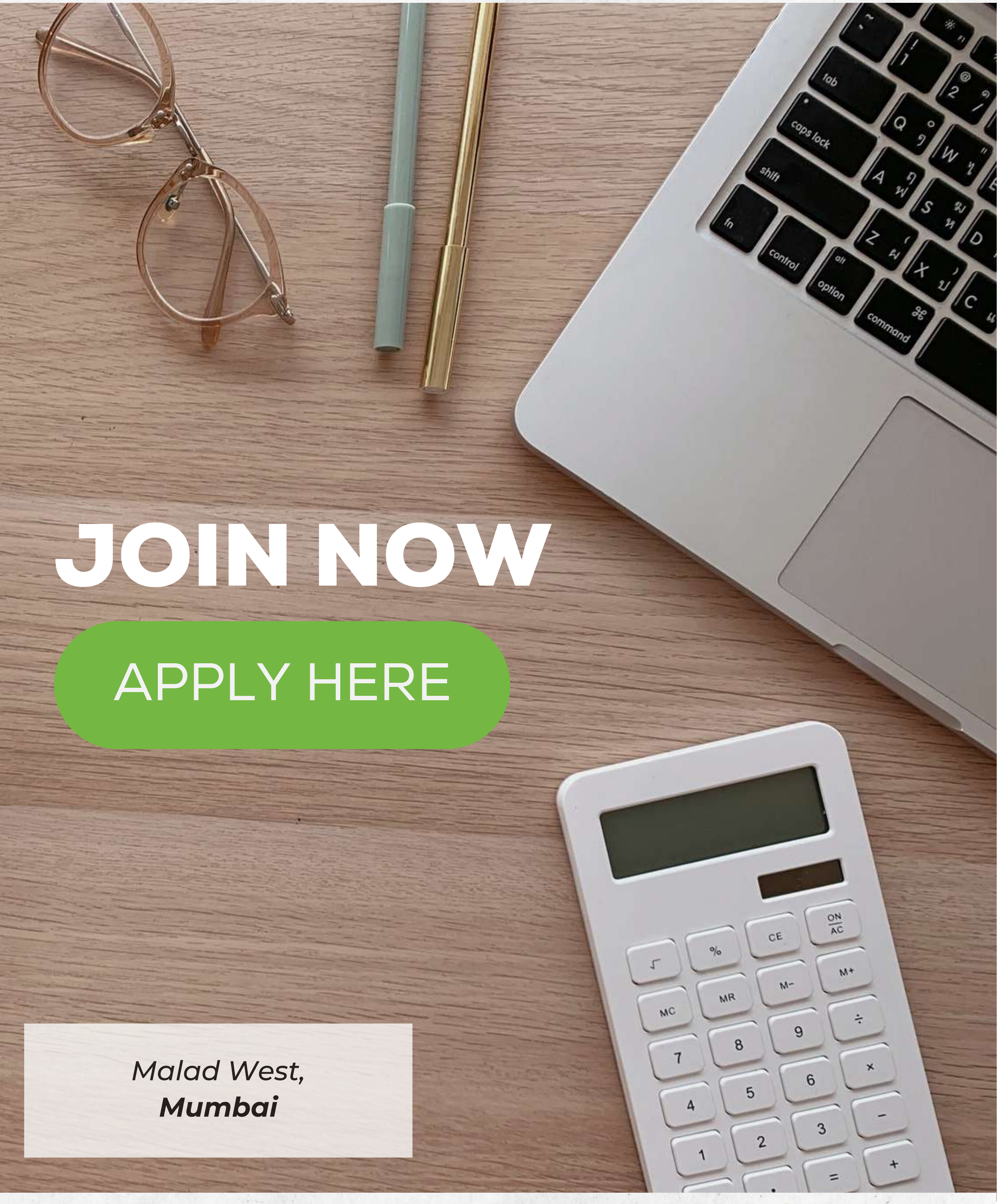

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APPLY HERE

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