Mutual Fund Investments, Banking & Payment Systems and Wealth Management

- 10 Certificate Courses
- 75+ Hours of Digital Content
- Access to Content on Digital Platform

Price: ₹ 5,750 + Taxes

About the Course Set

The course introduces the quintessential terminologies of the Indian Capital Markets : primary vs. secondary markets, equities vs debt products, derivatives products and the role of depositories in the capital markets.

The course evaluates Mutual Funds as an investment vehicle and the legal framework around Mutual Funds. It also builds on to the concept of an evolving asset class in the Indian markets i.e. ETFs.

The program weaves individual Capital Markets products into wealth management practices , risk management via insurance products, investment analysis and portfolio Management concepts. It also enables the participants to understand Capital Markets from Traditional vs. Digital banking system perspective (concepts, regulations & compliance , digital banking etc.)

Mutual Fund Investments

Professional Management: The biggest advantage of investing in mutual funds is that they are managed by qualified and professional expertise that are backed by a dedicated investment research team which analyses the performance and prospects of companies and selects suitable investments.

Financial Market

Financial markets play a vital role in facilitating the smooth operation of capitalist economies by allocating resources and creating liquidity for businesses and entrepreneurs. The markets make it easy for buyers and sellers to trade their financial holdings. Financial markets create securities products that provide a return for those who have excess funds (Investors/lenders) and make these funds available to those who need additional money (borrowers).

Wealth Management

Wealth Management is a service that gives you financial and investment advice, accounting and tax services, retirement planning, legal and real estate planning for a specific fee. The ultimate goal of working hard and earning money is so that we can have a peaceful and wealthy lifestyle later.

Banking and Insurance

Banking and Insurance are two sectors which are fast evolving and witnessing a transformational change. Banks are the backbone of all activities because every transaction where money is involved, the bank is the main character. Insurance business is one of the prominent financial services in modern times.

10 Self-Paced Learning Courses

01
Financial Market and Services
15 Hrs

02
The Basics of Exchange Traded Funds
30 Mins

03
Wealth Management
20 Hrs

04
Mutual Funds Beginners Module
5 Hrs

05
Mutual Funds Advanced Module
7 Hrs

06
Banking Fundamental Module from SBI
5 Hrs

07
Electronic Payment system in India from SBI
5 Hrs

08
Analysis of Investment
7 Hrs

09
Insurance and Risk Management
12 Hrs

10
Investment Analysis and Portfolio Management
3.5 Hrs

15+ Hours of Additional Content - Smart Cards

01 Interest Analyst — 2 Hrs 48 Mins

02 Bonds Pricing Analyst — 2 Hrs 31 Mins

03 Treasury Bills Analyst — 25 Mins

04 Financial Planning Adviser — 60 Mins

05 Mathematics of Investing Adviser — 50 Mins

06 Investment Types Adviser — 40 Mins

07 Macroeconomics Basics Adviser — 1 Hr 12 Mins

08 Private Equity Funds Taxation Adviser — 45 Mins

09 Diversification and Portfolio Risks Analyst — 1 Hr 22 Mins

10 Customer Relationship Adviser — 3 Hrs 18 Mins

*Disclaimer : *Smart cards/SLPs are structured reading material from various NSE Academy/Web sources and available to all registered users of NSE Knowledge Hub platform.*

SLP Badges

01

Financial Market and Services

Course Duration: 15 Hrs

This course begins by exploring the various market segment and their products. The content covers the various terminologies used in the capital markets, various intermediaries, products, investments, stock exchanged, regulators and regulations. It also covers miscellaneous items and various mathematical methods to evaluate investments.

Course Outline:

- Investment Basics
- Overview of Indian Securities Markets
- Securities Primary Markets
- Secondary Markets
- Debt markets
- Derivatives
- Depository
- Mutual Funds Concepts and Modes of Analysis Legal Framework

02

The Basics of Exchange Traded Funds

Course Duration: 30 Mins

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

03

Wealth Management

Course Duration: 20 Hrs

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

04

Mutual Fund Beginners Module

Course Duration: 5 Hrs

This course demystifies the concept of mutual funds and helps create awareness and knowledge about the industry and its functioning. The course will hand-hold an investor in investing in mutual funds by explaining the types of products, method of investing, processes involved, regulations, and taxation of mutual funds.

Course Outline:

- Mutual Funds
- Mutual Funds - Products and Features - Equity Funds
- Exchange Traded Funds
- Debt Funds
- Liquid Funds
- Offer Document
- Accounting, Valuation and Taxation
- Regulations

05

Mutual Funds Advanced Module

Course Duration: 7 Hrs

This course aims at providing comprehensive and in-depth knowledge about mutual funds. Users of this course can become independent mutual fund advisors or be a part of various AMCs. The first part of the course takes the user through basics of mutual funds, types of schemes, channel management practices for becoming a mutual fund distributor, tools for measuring risk return and performance of funds. The second part of the course focuses on financial planning and helping customers build the right portfolio to help them meet their goals. The course also gives the user an understanding of the regulatory framework that is applicable to mutual funds.

Course Outline:

- Fund Distribution and Channel Management Practices
- Investor Services
- Risk, Return and Performance of Funds
- Mutual Fund Scheme Selection
- Selecting the Right Investment Product for Investors
- Helping Investors with Financial Planning
- Recommending Model Portfolios and Financial Plans

06

Banking Fundamental Module from SBI

Course Duration: 5 Hrs

This course helps understand the banking structure in India. It covers all aspects of banking including retail and wholesale, deposits and lending, rules and regulations, customer care and customer management. It also covers banking technology and the advances made there on. It covers the entire gamut of banking products and sector. Course Outline: Indian Financial System Banker Customer Relationship Banking Products and Services Banking Regulations.

Course Outline:

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

07

Electronic Payment system in India from SBI

The banker to every Indian

Course Duration: 5 Hrs

Certification in Electronic Payment Systems empowers you in digital banking by offering basic information on electronic and digital payment systems. Moreover, it creates an understanding of concepts like alternate delivery channels for banking, digital payment methods, channels available for remittances, platforms for digital banking solutions, and transaction workflow of digital banking channels. The course is curated and offered by SBI, with a great blend of theory and operational aspects for deeper understanding.

Course Outline:

- Introduction to Electronic Payment System
- What is Digital Transaction and its importance
- Digital transformation vis-à-vis Currency in Circulation
- What are the channels for Digital Payments?
- What are the payment channels instrumental for digital migration in terms of value?
- What are the payment channels instrumental for digital migration in terms of volume?
- What are the most common models of e-payment in India?
- How NPCI is instrumental in digital transformation in India
- NPCI products for electronic payments
- What are the emerging trends in Digital Payments?

Offering: 10 videos | 5 hours of content
Supplementary study material | Chapter-based full-length tests

08

Analysis of Investment

Course Duration: 7 Hrs

This course demystifies the concept of investments and their analysis. It covers both fundamental and technical analysis in order to make informed investment decisions. It also covers asset allocation and how to make investments based on such analysis. This comprehensively covers both company and market analysis.

Course Outline:

- Introduction to Fundamental Analysis
- Understanding Financial Statements
- Valuation Methodologies
- Introduction to Technical Analysis
- Candle Charts
- Pattern Study
- Asset Allocation

09

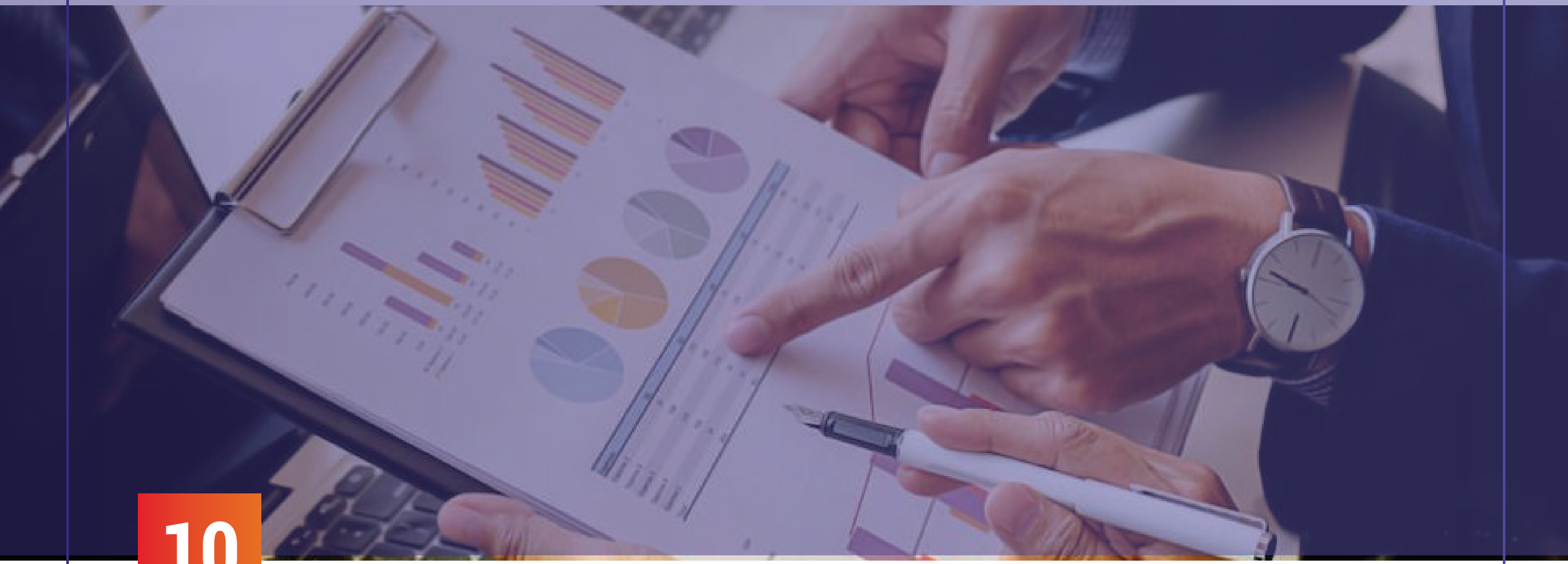
Insurance and Risk Management

Course Duration: 12 Hrs

This course begins by introducing insurance as a risk management tool and then explores all types of life and general insurance products. Details of various life and general insurance types and products are discussed in this course. It helps select the right insurance products and covers regulations related to insurance. It also helps manage clients in the insurance sector.

Course Outline:

- Introduction to Insurance
- Fundamentals of Risk Management
- Insurance Contract, Terminology, Elements and Principles
- General Insurance
- Personal and Liability Insurance
- Financial Planning and Life Insurance
- Insurance Intermediaries



10

Investment Analysis and Portfolio Management

Course Duration: 3.5 Hrs

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 analyse 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, analysing 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

NSE Academy | Knowledge HUB

How to Activate the Course?

01 Click on the payment link received in the email

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

03 Receive a Payment acknowledgement email

04 Within 48 working hours of making the payment, receive an email from NSE Academy stating the link to access the course and the login credentials for NSE Knowledge Hub

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

06 Completion certificates will be generated post completion of each course .

Contact Details

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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