

BACKGROUND

Banking & Financial Services (BFS) is an ultra-competitive & experiential domain.

Traditionally, BFS learning was imparted, on the job. Today, in the competition for a place in the industry, people who know the domain stand a better chance to get in.

A structured learning program in an education environment is superior to having to pick up the skills, while balancing various target and peer pressures, on the job.

CPBFS has been conceptualised to help you:

- Learn BFS skills during your under-graduate days;
- Start experiencing the BFS sector early;
- Get an easier entry into the BFS sector;
- Make a big impact when you formally join the BFS sector.

LEARNING OBJECTIVES

The *Basic Module* of **Certificate Program in Banking & Financial Services (CPBFS)** seeks to provide a basic orientation to banking and financial markets, mutual funds and financial planning. You will also be equipped to pass the Mutual Fund Distributors' Examination of National Institute of Securities Market.

The *Advanced Module* equips participants with deeper knowledge of capital markets, derivatives, commercial banking and wealth management. You will also be able to pass the Capital Market Dealer, and Derivative Market examinations of NCFM.

PRE-QUALIFICATIONS FOR ENROLMENT

12th Pass in any field is a pre-requisite for joining the *Basic Module* of CPBFS

The following can enroll for the *Advanced Module* of CPBFS:

- Qualified in the *Basic Module* of CPBFS; or
- Graduates who score over 60% in finACE

DURATION

Basic Module 100 hours [80 hours class room + 20 hours project]
Advanced Module 100 hours [80 hours class room + 20 hours project]

TOPICS COVERED

Financial Products

- Equity
- Debt
- Derivatives
- Mutual Funds
- Insurance

Banking

- Branch Banking
- Commercial Banking
- Private Banking

Financial Advisory

- Financial Planning
- Wealth Management

Detailed Curriculum Overleaf

ASSESSMENT CRITERIA

• Exercises / Projects / Presentations	20%
• Intermediate Examination	30%
• Final Examination	40%
• Attendance	5%
• Class Participation	5%

CERTIFICATION

Basic Module Partner institution (if applicable) + finberry
Advanced Module IAB of UK, for participants who qualify

IAB Qualifications for business

CURRICULUM *Basic Module*

Banks & Financial Institutions Overview
Debt Market Overview
Equity Market Overview
Derivatives Overview
Insurance Overview
Banking - Select Legal Provisions
Banking- Customers
Banking - Customer Rights
Banking - Security Creation
Banking - NPA
Banking - Accounting & Review
Mutual Fund - Overview
Mutual Fund- Constituents
Mutual Fund - Key Financial Drivers
Mutual Fund - Offer Documents & NFO
Mutual Fund - Returns
Mutual Fund - Risk & Other Quant Concepts
Mutual Fund - Risk-adjusted Returns
Mutual Fund - Reporting
Mutual Fund - Taxation
Financial Planning - Product Overview
Taxation Related to Investment
Financial Planning - Time Value
Financial Planning - Steps
Financial Plan - MS Excel Workshop

CURRICULUM *Advanced Module*

Valuation - Building Blocks
Fundamental Analysis of Equity
Debt Valuation
Valuation - Excel Workshop
Capital Market Legislation
Stock Exchange Equity Systems (NEAT)
Derivatives - Concept, Application, Pricing
•Forwards
•Futures
•Options
Derivatives - Issues
•Accounting
•Taxation
Stock Exchange Derivative Systems(NEAT)
Currency & Interest Rates
Trade Policy Framework
Working Capital Financing
Export Finance
Export Documentation
Rules for Collection of Payments
Letters of Credit & UCPDC 600
Guarantees
Import Finance

Risks in International Trade
L/C Advising & Confirmation
Factoring & Forfaiting
Lines of Credit for Capital Goods
Bank Payment Mechanisms
Investment Approaches & Risks
Alternate Asset Classes
Assessing Structured Investment Products
Legal Entity Concept & Tax Issues
Valuation Aspects of Business & Typical Structuring Issues in Global Context
Retirement Planning
Estate Planning
Mutual Funds & Other Funds
Mutual Fund - M&A
Mutual Fund - Reporting
Mutual Fund - Risk Adjusted Returns
Mutual Fund - Excel Workshop
Mutual Fund - Selling Workshop
Communication & Soft Skills
Negotiation Skills

UNIQUE SELLING PROPOSITION

Practical Orientation

What else to expect from people who have been training the industry for over 12 years?!

We do not load you with theory. But, you will have enough theory to get your fundamental thought processes right.

Ask industry about **Advantage-India Consulting Pvt. Ltd** (www.advantage-india.in). That is our parent company.

Else, check **Indian Mutual Funds Handbook** (Vision Books, www.imfh.info). It is authored by our Chief Knowledge Architect. He also provides program development assistance for institutions like the Indian Institute of Banking and Finance (IIBF) and SEBI-subsiidiary, National Institute of Securities Markets (NISM).

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