



Program Description Document

Course Name	MUTUAL FUND
Course Name as on Certificate	CERTIFICATE PROGRAMME IN MUTUAL FUND
Certificate Type	Certificate of Course Completion by IIT-MADRAS
Certificate Issued by	IIT MADRAS
Course Objectives	<ol style="list-style-type: none"> 1. Introduction to Mutual Fund Industry & its Structure 2. Know about different types of Mutual Fund Products like Liquid fund, Debt fund, Equity fund, ETF and their features 3. Understand the Regulatory Framework and the Role Of SEBI 4. Learn about the Offer document of a Fund and the key aspects of Investor Services function 5. How Taxation works for different categories of Funds 6. Understand the scope Mutual Fund Performance. 7. Introduction to Advanced Mutual Fund Terms like Mutual Fund Structure, Products, Risk Management, Valuation & Accounting, Scheme Evaluation & Legal and Regulatory purview 8. Learn about Advanced Financial Planning model to know how to design an ideal portfolio for an Investor 9. Know how to distribute Mutual Funds and the Best Sales Practices as proposed by Regulator 10. Understand the Investor Protection guidelines.
Eligibility	<ul style="list-style-type: none"> • A bachelor's degree from a recognised Indian university or Students pursuing Graduation
Pre Requisites	Basic understanding on Indian Stock Market and Mutual Funds
Target Segment	<ul style="list-style-type: none"> • Students who are keen to build a career in Mutual Fund Industry which is one of the fastest growing verticle in the Financial Services Industry • Executives who are part of BFSI and want to upgrade skill set for better career opportunities • Professionals in other Industries or domain whose work profile is directly or indirectly connected to Financial Services Industry • Professionals or Businesses who intend to become Mutual Fund Advisors as part of Business expansion • Individuals who invest in mutual funds and who are interested to know about them in detail so that it helps them in their investment journey
Course Content	See Enclosed Progamme details – as Annexure 1
Pedagogy	<ul style="list-style-type: none"> • The Primary method of instruction will be through Online Video Classes. • Participants can access the courses via Desktop / Laptop / Smart phone. • The lectures and content are created by Financial Market Experts, Eminent Trainers & Well known Academecian who are quiet experienced. • This programme is a Compilation of Video Lectures, Mock Tests, Quiz and Case Studies.
Assessment	The students can assess their learning by undertaking Mock Tests, Quiz and Case Studies.
Programme Faculty	Programme Faculty are Mrs. Iyappan Jayaraman and Mr. P. Balasubramanyan Both are Senior Academicians with more than 30 years of experience in Teaching
Duration	15 Hours of Theory and 3 hours of Case Study.



Validity	Students will have to complete the programme within 15 days after registering for the course		
Programme Highlights/USPs	<p>On successful completion of the programme, you will have a good understanding of</p> <ul style="list-style-type: none"> • How Mutual Fund Industry works and its scope of operations. • What are the different types of Products offered by Mutual Funds, their Key Features and risks involved • Understanding of Advanced Mutual Fund Concepts • Mutual Fund Taxation & how to analyze Mutual Fund Performance. • How Mutual Funds can be used to design a proper Financial Plan for Individuals. • How to distribute Mutual Funds and the best Sales Practices to be followed • The role of SEBI as a regulator <p>Other Highlights:</p> <ul style="list-style-type: none"> • Opportunity to earn a Certificate from IIT Madras. • Lectures imparted by Eminent Academicians and practicing Industry Experts. • Fully Online Pre-Recorded Course with online lectures that provides a “real” classroom experience in a “virtual” environment. • Seamless technology that can transmit lecture videos effectively at home broadband connection of 512 kbps. • User friendly and easy to use technology interface. No expensive and time consuming software/hardware installations required at your end. • Through our web portal, Students are provided access to course presentations, case studies, assignments and other reference materials as applicable for specified courses • Learn from Anywhere – No need to travel to an institute or training centre. Learning continues even if you are traveling or not available at any specific location. You may also learn from the comfort of your home at your convenient time. 		
Total Fees		Total Fees (Rs.)	
	Total Programme Fee	Rs. 2000/- + GST	



ANNEXURE 1

PROPOSED COURSE OUTLINE / PROGRAMME / PLAN

1. Introduction to Mutual Funds
2. Mutual Funds structure
3. Products & Features – Overview
4. Regulations
5. Offer Document & Investor Services
6. Debt Funds
7. Liquid Funds
8. Exchange Traded Funds
9. Equity Funds
10. Taxation
11. Performance of Mutual Funds
12. Financial Planning
13. Introduction to Advance MF & its Keywords
14. Financial Planning Advanced
15. Mutual Fund Structure – Advanced
16. Mutual Fund Products- Advanced
17. Investment & Risk Management
18. Valuation of Schemes & Accounting
19. Fund Distribution & Sales Practices
20. Investor/Investment Services
21. Scheme Evaluation
22. Legal & Regulatory
23. Investor Protection
24. Questions & Answers - Mock Test