NARMADA COLLEGE OF MANAGEMENT

(Approved by AICTE and Affiliated to GTU)

OFFERS

CERTIFICATE COURSE IN

INTRODUCTION TO INVESTMENT MANAGEMENT

[Three Months - Virtual Mode]

(1st April, 2022 to 4th June, 2022)

Apply:https://forms.gle/DEP7niirR8bZCmq48

Narmada College of Management
Shukla Tirtha Road, P O Zadeshwar, Bharuch – 392011
Phone : 02642-246249, Mobile : 9099063337
Email : program@ncmbharuch.ac.in, For more details: www.ncmbharuch.ac.in

OVERVIEW:

The Certificate Programme in ***Introduction to Investment Management*** is designed to offer the required knowledge for prospective investors to handle the various aspects of investment including wealth management, security selection, like stocks, bonds, mutual funds and others to meet specified investment goals for the benefit of the investors. This course aims to provide real time knowledge and skills pertaining to Investment to participants with or without prior exposure/experience. The programme will enable participants in taking informed and effective decisions in the areas of financial planning, retirement planning, and wealth creation.

SIGNIFICANCE:

This course has been designed to bridge the knowledge gap amongst youngsters about intricacies of equity market, mutual fund investment financial planning and retirement planning for wealth creation. The course has been created to equip the learners with the science and techniques of investment management, retirement planning and financial planning.

By the end of the Course, participants will be equipped with the knowledge and understanding related to:

- Formulation of the objectives of investments and managing a portfolio.
- The basic of financial analysis for investment purposes.
- Evaluation of various investment products to create a personal investment policy.

PROGRAMME OUTCOMES:

- Ability of financial & retirement planning through wise investment management.
- Application of this knowledge to personal financial planning and wealth management.
- Access to resources (E-Books & Articles) on investment management. Links to video and audio lectures
- An orientation to effective investment by an expert at the end of the course.

Module	Topic	Saturday (Evening Hours: 2.30 to 4.30)
I	Introduction to Investment	• Investment Evaluation Framework • Basics of Investing • Investment Attributes • Understand the various types of small savings instruments
II	Financial Planning (Part 1) for young investors	• Introduction of financial planning • Basics of personal finance, •Financial planning, and budgeting Understand assets, liabilities and net worth •Life Cycle and wealth cycle •Systematic Approach to Investing
III	Financial Planning (part-2) for Executives	• Choosing the Right Investment Options. • Asset Allocation Strategy. • Self Portrait • Saving & Investment Related Products • Tax Saving Options • Purchase of Financial Products
IV	Equity Investment	• • Introduction to Equity market • Trading mechanism of Equity market. • Asset Allocation and Investment Strategies. • Measuring Investment Returns
V	Mutual Funds Investment	• Basics of Mutual funds: Understand the meaning and features of a mutual fund. •Key terms and concepts associated with mutual funds. •The benefits and limitation of investing with mutual funds. Know the regulatory framework for mutual funds • Know the various types of mutual fund products • Know the investment options in mutual funds • Know the processes associated with investing in mutual funds
VI	Retirement Planning	•Understand the retirement planning process. •Understand and estimate retirement corpus. Determine the retirement corpus •Learn about the various retirement products and their features

PRACTICAL ASSIGNMENTS AND TEST:

- During the whole course, total 2 assignments will be given i.e. 1 assignment at the end of each month. The participants have to compulsorily complete and submit all assignments which will be graded.
- At the end of course, a MCQ test will be conducted (30 questions in 1 hour). This is also compulsory for all participants.

RESOURCE PERSON:

Dr. Chetna R Makwana

MBA (Finance), Ph.D. (Management), FDP (IIMA)
Chetnaraj30@gmail.com **Contact No**.: 9924865756,

Dr. Chetna R Makwana is a PhD (Management, Behavioual Finance), MBA (Financial Management),FDP (IIMA), and CS (Inter) qualified. She also has multiple certification in area of management and Finance from IIMA., IIMK, SMF,IIFT etc. she is certified for Behavioral finance from Duke University. She is IIMA alumni (FDP).

Areas of Specialization: Corporate Finance, Investment Management, Security Analysis and Portfolio Management, Behavioural Finance , Corporate Valuation, Financial Derivatives, strategic management etc.

She has over 16 years of experience in Academics, Research, Corporate training and investor training. She has done more than nine FDP from various IIMs. She has worked with many organizations of repute like CED, EDII, ICAI, SEBI, and some Industries and AMC etc. She is a**ppointed** as Resource person by SEBI for Investor Education Programme in India.

DETAILS:

Who can participate?	**The Programme is intended to be offered to:** • **Any Under-graduate and Post-graduate students from any discipline Commerce, Management, Engineering etc .** • **Working Professionals from Industry.** • **Others**
Duration:	**10 weeks of teaching-learning with 20 contact hours, from 1st April, 2022 to 4th June, 2022.** **Online classes will be held on Saturday – 2.30 hours per day**
Programme Fee:	**Rs. 1000 : for Students** **Rs. 2000: for Industry Professionals& for others** **(NON REFUNDABLE)**
Certification:	**Certificate from NCM (Narmada college of Management) will be provided upon successful completion of the Programme** **(Minimum 70% attendance and a qualifying score of 60% required)in test/Quiz assignments.**

IMPORTANT DATES:

Last Date of Application	Last Date for Fee Payment	Commencement Date
31st March 2022	31st March 2022	1st April 2022

IMPORTANT GUIDELINES ABOUT THE PROGRAMME

- The duration of this course is 2- months of teaching-learning with 32 contact hours, from **1st April to 4th June, 2022.** Online classes will be held on Saturday – 2.30 hours.

- Classes will be conducted offline/online via Google Meet. The participants will have to ensure the availability of proper device (Laptop/Desktop) and internet connectivity for attending the live sessions.
- The online session recordings will be made available. Additional reading material in E-book format, Power point presentations developed for this course will be shared.
- If all the participants has attended 70% of total sessions, submitted all 3 assignments and cleared the MCQ test, then only they will be issued a completion certificate.
- Interested candidates can apply by registering at the link given below: https://forms.gle/DEP7niirR8bZCmq48
- Payment can be made through NEFT using below mentioned details.

Name of Account:	**NARMADA COLLEGE OF MANAGEMENT**
Bank Name:	**BANK OF BARODA**
Bank Account No.:	**13140200000037**
IFSC Code:	**BARB0GNFCOM**

- Fees will be accepted through online mode only. No cash payments will be accepted. Fees once paid will not be refundable.
- For any clarifications/details please feel free to contact: program@ncmbharuch.ac.in

Apply:https://forms.gle/DEP7niirR8bZCmq48

For more information visit:

https://ncmbharuch.org/wp/certificate-course-on-introduction-to-investment-management/