

Program Title

AMFI Mutual Funds (Advisor) Module Preparatory Training

Program Duration

2 days

Program Objectives

To prepare participants for AMFI Mutual Funds (Advisors) Module Certification

The classroom-interaction would engage the participants by,

- a. Revising important concepts & terminologies
- b. Practicing exam-format questions

Program Flow/Outline

Day/Time	Session	Time	Methodology	Remarks
I/AM	Introduction to Savings/Investments Mutual Funds & Financial Planning	1 hr	Instructor Led Discussion (ILD)	To create interest about the need for the program, its importance for self and clients
	Course Curriculum Chapter 1-3	2 hrs	ILD Quiz	Build foundation of MF business in India
I/PM	Course Curriculum Chapter 4-8	4 hrs	ILD Quiz	Nuts & Bolts of MF structure, constituents, their interdependence & functioning
II/AM	Course Curriculum Chapter 9-12	3 hrs	ILD Quiz	Sorting Good funds out from bad and finding the right fit for the client
II/PM	Course Curriculum Chapter 13-15	2 hr	ILD Quiz	Understanding portfolio construction and management
	End Test Review	2 hrs	70-75Q Practice Test	Reinforce learning through a mock test

Who should attend?

Everyone scheduled to appear for the AMFI Mutual Funds (Advisor) Module test.

Min/Max Participants

25-50

AMFI Mutual Funds (Advisor) Module Curriculum (as revised in Jun 2006)

AMFI (ADVISOR) MODULE

Section 1 – Concept and Role of Mutual Funds

Section 2 – Fund Structure and Constituents

Section 3 – Legal and Regulatory Environment

Section 4 – The Offer Document

Section 5 – Fund Distribution and Sales Practices

Section 6 – Accounting, Valuation and Taxation

Section 7 – Investor Services

Section 8 – Investment Management

Section 9 – Measuring and Evaluating a Fund’s performance

Section 10 - Helping Investors with Financial Planning

Section 11 - Recommending Financial Planning strategies to Investors

Section 12 - Selecting the right investment products for Investors

Section 13 - Helping Investors understand risk in Fund Investing

Section 14 - Recommending Model Portfolios and selecting the right fund

Section 15 - Business Ethics for Mutual Funds