

**Program Title**

**Financial Markets & Insurance Overview**

**Program Duration**

2 days

**Program Objectives**

By the end of the program, the participants shall have key insights about financial markets in India and be able to use this knowledge in discussions of insurance solutions with clients.

**Program Outline**

Day	Time	Session	Details	Methodology
I	AM	Financial Markets Overview	Types of Financial Markets & their purpose <ul style="list-style-type: none"> <li>○ Capital markets</li> <li>○ Money Markets</li> <li>○ Derivatives Markets</li> <li>○ Insurance Markets</li> <li>○ Forex Market</li> </ul>	ILD Group Presentations Quiz sessions
	PM	Investment Instruments for Insurance Products	<ul style="list-style-type: none"> <li>○ Primary vs. Secondary Markets</li> <li>○ Equity vs. Debt</li> <li>○ Equity instruments &amp; associated terminologies – Ordinary Equity Shares, Preference Shares, Warrants, EPS, PE, DPS, Div Yield, RoE, RoNW etc</li> <li>○ Debt Instruments and associated terminologies – G-Secs, Corp Bonds, CP, CD, T-Bills, Current Yield, YTM, Average Maturity, Duration, Yield Curve etc.</li> </ul>	ILD Group presentations
II	AM & PM	Investment Application	Regulatory Prescription wrt Investments for Insurance Companies <u>Equity Funds</u> – Their characteristics & evaluation <ul style="list-style-type: none"> <li>○ Types of Funds – Largecap/Flexicap etc</li> </ul>	ILD Group Activities

			<ul style="list-style-type: none"> <li>○ Fund Characteristics - Concentration, Sectoral Exposure, Portfolio Turnover etc</li> <li>○ Risk Characteristics - Standard Deviation, Beta, R-Squared etc</li> </ul> <p><u>Debt Funds</u> - Their characteristics &amp; evaluation</p> <ul style="list-style-type: none"> <li>○ Debt Funds Categories and their target market – Gilt, Bond, ST, Liquid etc</li> <li>○ Factors that impact Debt Funds – Credit Ratings, Maturity etc</li> <li>○ Risk &amp; Return – Credit Rating &amp; Spread, Average Maturity, Duration, Modified Duration</li> </ul>	

**Who should attend?**

Employees with 2-5 years of experience in Insurance Sales

**Min/Max participants**

15-20