

Program Title**Launch pad****Program Duration**

10 days (0930hrs to 1730hrs)

Program Objectives

By the end of the program the participants shall be able to

- Converse about various asset classes and related investment products
- Understand the various Macro and Micro Factors that affect these asset classes
- Differentiate the instruments depending on requirements and their purpose
- Provide investment solutions to investors

Program OutlineDay 1

- Basic Concepts
 - Money
 - Financial Assets
 - Securities
 - Equity, Debt
 - Primary Market, Secondary Market
- Financial Markets, Instruments & Participants
 - Markets – Equity, Debt, Forex
 - Flow of Funds – Intermediation, Disintermediation
 - RBI, Banks, Finance Companies, Fund Managers, Stock Brokers, LICs, Superannuation Fund

Day 2

- Wealth Management Foundation
 - Savings vs. Investments
 - EPSIS Conundrum
 - Life Cycle Stages
 - Wealth Cycle Stages
 - Asset Classes
 - Safety, Liquidity, Return & their interplay
- Traditional Savings and Investment Instruments
 - Fixed deposit, LI, Real Estate, Gold, PO Savings schemes
 - Equity, Bonds – Features & terminologies
 - Types of Equity Instruments
 - Types of Debt Instruments
 - Historical perspective on Equity & Debt

Day 3, 4 & 5

AMFI (Advisors) Module course with adequate practice

Day 6 & 7

- Economic Environment
 - Economic Growth & National Income
 - Inflation, Role of Money towards inflation
 - Objectives of Economic Policies
 - Economic Policies

- Monetary Policy
- Fiscal Policy

Macroeconomics

- Multiplier Model
- Business Cycles
- International Trade & Balance of Payments
- Impact on investment values

Media & Information Sources

- The Financial Press
- Research Papers
- Company Reports

Day 8

Business Etiquettes

- Art of greeting
- Art of introductions
- Art of addressing, protocol in a business hierarchy
- Art of conversations- topics to avoid, small talk
- How to leave a lasting impression
- Telephone Etiquettes
- Cellphone Etiquette
- Communication Skills – Listening Skills & Questioning Skills
- Addressing titles
- Business Body Language
- Time Management

Day 9

Financial Planning Concepts

- Time Value of Money
- Financial Planning Strategies
 - Power of Compounding
 - SIP/RCA
 - Value Averaging

- Asset Allocation
 - Principles of Asset Allocation
 - Strategic Asset Allocation
 - Fixed vs. Flexible Asset Allocation
 - Tactical Asset Allocation
 - Importance of Asset Allocation

Comparison of Products

- MF vs. Direct Equity
- Bank Deposits vs. Debt Funds
- Diversified Equity Fund vs. Thematic/Sectoral Fund
- Debt Funds – Types and the audience that they address
- End Test

Day 10

- Other new age investment products
 - PMS – Various Models
 - Structured Products
 - Capital Protected Products
- Test Results
- Review of the Program
- Feedback & Close

Program Methodology

Interactive Presentation

Case Studies

Exercise and Quiz

End-Test

Who should attend?

New Recruits

Min/Max participants

15-20