

Program Title**Market Orientation Program****Program Duration**

2 days (0930-1730 hrs)

Program Objectives

By the end of the program, the participants would be able to:

1. Become aware of various Macro Factors that affect Capital Markets in general
2. Get conceptual understanding of Stock Market Trading & Terminologies
3. Appreciate financial planning as the most systematic method to achieve financial goals
4. Understand the various needs of different types of clients and provide appropriate solutions
5. Be aware of pitfalls in financial planning so as to avoid them in practice

Program OutlineMacro Economic Environment

- Micro & Macro economics
- Business Cycles
- Economic Indices – Lead, Lag & Co-incident
- Economic Policy - Fiscal & Monetary policy
- National Income, GDP, GNP
- Interest Rates & Inflation

Equity Markets & Derivatives – Conceptual Understanding

- Historical Perspective - Stock Exchanges, Products
- Concepts
 - Speculation v/s Gambling
 - Arbitrage, Leveraging, Margin Trading
 - Primary & Secondary market
 - Equity, Preference
 - Bonus, Rights, GDR / ADR & Buyback
 - Depository
- Sources of Information
- Valuation
 - Fundamental & Technical Analysis
 - Dividends, Earnings & P/E Ratio
 - Book Value
 - Market Capitalisation
 - Beta & Capital Asset Pricing Model
 - Industry specific indices
- Secondary Market – Trading Process
- Derivatives Brief

Insider Trading

Introduction to Financial Planning

- Financial Planning – Definition
- Basis for FP – Life Cycle Stages, Wealth Cycle stages
- Process of Financial Planning
- Elements of a Plan

Financial Planning Strategies

- EPSIS Conundrum
- Risk Management & Insurance Products
- Comparison of various investment instruments
- Direct vs. Indirect Investing

Financial Planning Tools

- Time Value of Money, PV, FV & Power of Compounding
- RCA, Value Averaging
- Risk Profiling
- Asset Allocation & Its principles

Steps to Financial Planning

- Case Studies
- Common Pitfalls