

## Research Analyst and Derivative Strategist- Syllabus Session 1

Sr. no	Topic	Sub- Topic	Objectives	Hrs	Theory	Practical
1	Introduction to Indian Financial System	Four pillars of IFS, How to link all the components of IFS	Students will understand the important segments of Indian financial system and their significance. As a Fresher, they will be getting information to understand market trend practically, which will enable them, to participate actively in all the activities	2	100	0
2	Types of Financial Markets	Capital markets, primary, secondary, Commodity and Currency markets and Debt market	Students will understand how various markets work and where to observe them. They will also know they four currencies traded on NSEINDIA and GOLD trading on MCXINDIA	2	50	50
3	Wealth Management : Scope and Significance	Growth in WM industry in India, The rising demand for certified Wealth managers.	Students will learn wealth Management	2	70	30
4	Indian Banking System: Classification and Products	Classification and Products: Commercial Banking/ Vs. Investment Banking. Types of Products	Students will understand the concept of wealth management for corporates with the meanings of SSU and DSU.	2	100	0
5	Primary Markets	IPO Process, Role of Financial underwriters, Projects on Successful IPO listed in last one year.	Students will learn primary market	2	80	20
	Capital market	Primary Placements Bidding Vs. OFS Private Equity Preferential Shares Prelisted Equities	Students will understand the basic differences between book building issue and offer for sale, they will also understand how to rate the IPO on multiple parameters, role of merchant bankers will be cleared.	2	100	0
6	Role of Regulators and Depositories	Role of SEBI, RBI, NSDL and CDSL	Students will understand exact nature and importance of regulators in the financial system, to run it with full swing and without any risk	2	100	0
7	Secondary Markets	Products, Live session on Debt market and Currency market on NSE India website	Students will understand the settlement process and pay in an pay out in detail	2	0	100
8	Alternative Investment Funds and its Types	A1 and A2 AIFs	Students will compare MF schemes on multiple parameters like past performance, Current Expense Ratios and Diversification	2	100	0
9	Basics of Investments and multiple types of Asset classes.	Investment mantras, Short term and long term asset classes	How to do financial planning as per financial goals setting, how to do risk profiling, the terms like AUM and AMC will be cleared thoroughly.	2	50	50
10	Live Exposure to Markets: (Practical session))	Practical session on live market	Students will get to understand the differences between intraday trading and long term investments, they will know risk associated with short term trading and how to avoid it	3	0	100
11	Types of Orders, Order modification, Stop loss order	SL, MKT and LIMIT orders	Students will learn Types of orders	2	50	50
12	Settlement process and Role of NSCCL: Practical session on International Markets	Moneycontrol and various websites for practical training.	Students will understand how to prioritize goals of the investors at the same time, how to make a financial plan	2	50	50
13	Mathematical skills, Calculating Ratios, FV and PV	Mathematical skills for Future and present value with Ratio analysis	Understanding time value for money, IRR and Brokerage calculations	2	0	100
14	Introduction to Managing Risks through Insurance	Concept of Insurance, as a contract between INSURER and INSURED	Students will understand the importance of Life insurance and mediclaim, and their workings as well	2	100	0
15	Life Insurance	Types and significance: Clearing Concepts and working of Life insurance Industry	Students will learn Life insurance	2	50	50
16	Health Insurance and General Insurance	Types of Mediclaim , cashless and Claim settlement	Students will learn Health Insurance	2	100	0
17	Trading Membership : ISIN numbering, Market haults, Circuit filters	Price band criteria and market haults	Students will learn Trading Membership	2	50	50
18	Trading on NEAT system, Short term and long term Trading: Differences between Trader and Investor.	Intraday trading Vs. Long term investment	Students will learn Trading On NEAT System	3	50	50
19	Revision Lecture	Revision Lecture	Students will learn Revision Lectures	2	100	0
20	Live Project (VIVA)	EXAM	Students will learn Live Project ( VIVA)	3		
	<b>TOTAL HRS</b>			<b>45</b>		

## Research Analyst and Derivative Strategist- Syllabus Session 2

Sr. No	Topic	Sub - Topic	Theory	Practical	Hrs
1	Introduction to Indian Financial Markets, Equity Markets	Overview of IFM	100	0	2
2	Introduction to Wealth Management	Scope and Significance and Relevance, Growth in WM industry in India, The rising demand for certified Wealth managers.	50	50	2
3	Introduction to Investments	Variuos investment instruments, PPF, NPS, Debt Funds, Bonds, Fixed Income Products, Mutual Funds	100	0	2
4	Indian Banking System	Classification and Products: Commercial Banking/ Vs. Investment Banking., Bancasurrance, CASA prducts.	100	0	2
5	Back End working of Equity markets	Role of NSCCL, Trading membership, Settlement cycles, Circuit filters	50	50	2
6	Role of PE, VC and Primary dealers, Primary Placements	Bidding Vs. OFS Private Equity Preferential Shares Prelisted Equities	100	0	2
7	Secondary Markets: Products,	Live session on Debt market and Currency market on NSE India website, Live Exposure to Markets: (Practical session)	0	100	2
8	Insurance :	Life and Non Life	100	0	2
9	Introduction to Derivatives	Forward and Future , options, NIFTY as An Index	50	50	2
10	Introduction to Options	Call and Put, Options Strategites, Strangle and Straddle, Collar and Butterfly, Multiple types of Indices.	50	50	2
11	Introduction to Finanical Planning	Goal based Planning, Identifying Financial Goals, Wealth Creation Ideas, Building a Mutual Fund portfolio	100	0	2
12	Introduction to Commodity markets	Classification of Commodities, Types of Agro commodities, Bullions, Energy commodities,	50	50	2
13	Practical Session	MCX India for Commodity markets.	0	100	2
14	Introduction to Indian Currency markets	Live session	50	50	2
15	Fundamental Analysis	Sectoral Analysis, Ratio Analysis, Sums based on Calculating PV and FV	50	50	2
16	Data Interpretaion	Understanding Financial Statements	50	50	2
17	Foreign Exchange Derivatives	Exchange Traded Currency futures	50	50	2
18	Introduction to Reserch Analyst as a Profession	Fundamentals of Research, Economic Analysis: Macro and Micro econmics variables, Impact.	100	0	2
20	Industry Analysis, Company Analysis	business and governance, Corporate Actions and Valuable Principles	50	50	2
21	Introduction to Technical Analysis	Principles and History	50	50	1
22	MACD, RSI	Candle stick charts, patterns, Analysis	0	100	1
23	Practical Session for Technical Analysis	Practical Session	0	100	1
24	Basics of Estate Planning	Behavioral Finance	100	0	1
25	Comparison of Products across all categories	Risk profiling and asset allocation, Portfolio performance and evaluations on multiple parameters	50	50	1
24	Case Studies	Case Studies	0	100	1
25	Live Projects	Live Projects	0	100	1
	<b>TOTAL HRS</b>				<b>45</b>

