

MES Asmabi College, P Vemballur

Research Department of Commerce

Certificate Course on Financial Services 2021-22

Course Syllabus

Objectives:

1. The students will get hands-on market knowledge and interaction with industry experts.
2. To acquire knowledge on current market news, wealth management, current job opportunities and career growth.
3. To invest in various asset classes/companies.

Module I - Introduction

- Course Introduction
- Terminal Introduction, Asset Classes, Debt, Gold, Real Estate, Equity, Mutual Fund
- **Activity -SWOT**

(2 Hours)

Module II - Banking, Insurance & Mutual Funds

- Types of bank accounts, Types of Loans, Types of Fund Transfers
- Basic Insurance Jargons, Types of Insurance
- Mutual Fund Jargons, Mutual Fund Working Mechanism, Types of Mutual Funds
- Basic Jargons
- **Activity – Sensex & Nifty stock Weightage Collection**

(5 Hours)

Module III - Stock Market Introduction

- Stock Market Introduction
- IPO & Corporate Actions
- **Activity-** Recent IPOs and recent Corporate Actions

(3 Hours)

Module IV – Fundamental and Technical Analysis

- Fundamental Analysis
- Technical Analysis
- Trading Terminal Training
- Portfolio construction with money control
- Portfolio review and evaluation
- **Activity – Macro stock correlation, Marking on live scrips**

(10 Hours)

Module V - Financial planning game

- Portfolio maintenance with Excel
- Basic Excel Functions for Portfolio construction, Visualization using Excel
- Simulation of real-life financial implications
- **Activity - Individual Portfolio Construction**
- Industry Visit

(10 Hours)