



hunarho  
दिशा सही तो दशा सही



**Be a Certified  
Wealth Manager**

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- > Investment Avenues in India
- > Private Finance Fundamentals
- > Portfolio Management

## Program Overview:

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Become a certified wealth manager is our flagship course, suitable for undergraduates and graduates who aspire to build a career in wealth management in banks and investment management companies. Our certified wealth manager course covers important topics such as certified financial manager skills and portfolio management strategies. The certified wealth manager course is for you if you want to learn from Certified Financial Planners the best ways to become a wealth manager, asset manager, certified financial manager, or portfolio manager in the BFSI industry.

## Program Features:

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- > Self-Paced videos
- > Industry Based Case Studies
- > Assignments & Quizzes
- > Project Assessment

## Mode of Delivery

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- > Self-Paced Videos - **22 Hours**
- > Short Learning Material - **1 Hour**
- > Capstone Project/Case Study - **6 Hours**
- > Assessments & Assignments - **1 Hour**

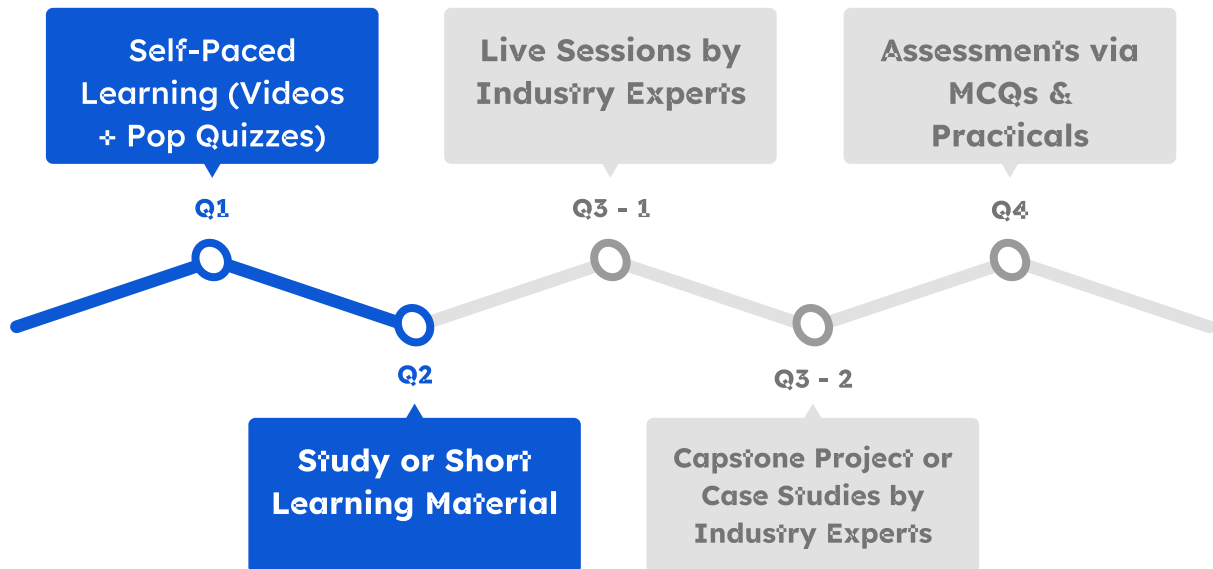
## Instructor Details



### Krishnan Gopalakrishnan (CFA,CFP)

Krishnan Gopalakrishnan is a seasoned professional with more than ten years of experience in both academics and finance. He is skilled at blending theory with practical application. Presently employed as an Adjunct Faculty at Pune’s Dr. D. Y. Patil B-School, he brings expertise to the classroom, nurturing the next generation of finance professionals. As a Freelance Finance Trainer, with a focus on CFA Level 1 instructor he empowers learners through Hunarho.

## Course Structure



## Program Ideal For

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- › Individuals seeking financial literacy.
- › Students Interested in wealth management
- › Students Interested in investment management.
- › Anyone who wants to make informed financial decisions.

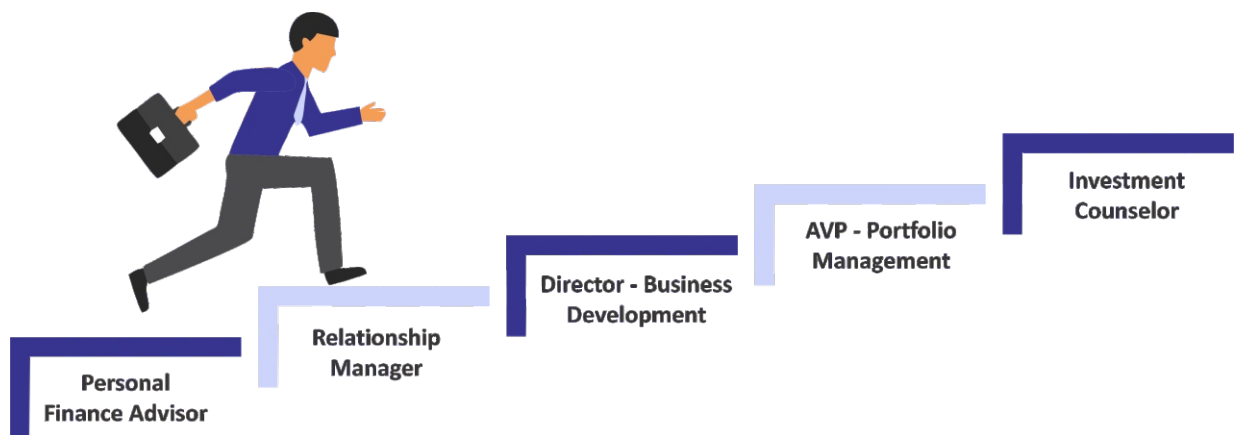
## Learning Outcomes

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- › Extensive knowledge about the functioning of Financial Markets
- › Risk and Return Evaluation of different Financial Instruments
- › Fundamentals of Portfolio Management
- › Experience with the tools used in Financial Analysis and Financial Planning
- › Application of Economic Concepts in Investments Risk Management using Insurance and Derivatives
- › Risk Management using Insurance and Derivatives
- › Overview of Fundamental and Technical Analysis used for Analyzing Investments

## Your Pathway To Success!

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# Course Details

## Week 1 :

### 1. Investment vs Saving Options

- › What are Savings and why is it essential
- › What are Investments and why is it essential
- › Tangible and Intangible Investments
- › Difference between income investments and growth investments
- › Sources of Return from Investments

### 2. Traditional Investment vs Modern Investment

- › Features and types of Traditional Investments
- › Features and types of Alternative Investments
  1. Physical Gold
  2. Digital Gold
  3. Gold ETF
  4. Gold Mutual Fund
  5. Sovereign Gold Bonds
  6. Gold Futures and Options
- › Bank Deposits
  1. Fixed Deposits
  2. Recurring Deposits

### 3. Small Saving Schemes

- › Post office Schemes
  1. Post office Savings Account
  2. National Savings RD Account
  3. National Savings Time Deposit Account
  4. National Savings Monthly Income Scheme Account (MIS)
  5. National Savings Certificate (NSC VII)
  6. Kisan Vikas Patra (KVP)
- › Public Provident Fund (PPF)
- › Employees Provident Fund (EPF)
- › Senior Citizen Savings Scheme (SCSS)
- › Sukanya Samriddhi Account (SSA)

#### 4. Chit Funds

#### 5. Real Estate

#### 6. Real Estat

#### 7. Risk Mitigation - Insurance

- › Life Insurance, risk management, risk transfer, risk mitigation
  - › General Insurance (Medical, Vehicle and others)
  - › Measurement of CLTV, retirement need calculator: Private Mortgage Insurance
  - › Term Plan v/s ULIPs
  - › General Insurance Products
  - › Types of Life Insurance: Products under Life Insurance
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### Week 2 :

#### 1. Financial Markets & Instruments

- › Financial Market & Instrument
- › Financial Market & Participants

#### 2. Indian Capital Market and Regulators

- › Indian Capital Markets
- › Regulator of Stock Market - SEBI
- › Regulator of Banking System - RBI
- › Regulator of Insurance Industry - IRDA
- › Regulatory of Retirement Benefits / Pension - NPS & PFRDA
- › Regulator of Mutual Funds - Association of Mutual Funds in India
- › Regulator of Investment Advisors
- › Regulation of Investment Advisors

### 3. Equities & Corporate Actions

- › Public vs Private offering of equity
  - › Trading and Settlement of Equities - Trade Lifecycle of Equity
  - › Types of Orders - Market order, Limit order, Stop loss order, etc.
  - › Corporate Actions - Bonus, Split, Rights Issue, Buybacks
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## Week 3 :

### 1. Fixed Income Investment

- › Types of Bonds with the risk and return characteristics
- › Bonds Valuation - Calculation of Risk and return
- › Yields - Current Yield, Yield to Maturity, Yield to Call, Yield to Worst
- › Bond conventions for quotes and calculations
- › Duration and Convexity
- › Introduction to Asset Backed Securities - MBS, ABS, CMO, CDO
- › Fundamentals of Credit Analysis

### 2. Derivatives

- › Derivatives
- › Forwards
- › Futures
- › Options
- › Swaps

### 3. Alternative Investments

- › Cryptocurrencies
- › Pvt Equity and Venture Capital Investing
- › Hedge Funds - Structure, Fees, Strategies
- › Currency Exchange Rates
- › Commodities
- › Art and NFT



## Week 4 :

### 1. Basics of Fundamental Analysis

- › Introduction to fundamental analysis
- › Skills required to become an analyst
- › Difference between Fundamental and Technical Analysis
- › Using the Annual Report
- › Porter's 5 force model
- › Evaluating the financial parameters

### 2. Mutual Funds

- › Structure and Framework of Mutual Funds in india
- › Types of Products and Investment Strategies
- › Types of Investments - SIP, Lumpsum, STP, SWP
- › Calculation of NAV
- › Recent developments and future prospects
- › Exchange Traded Funds vs Mutual Funds

### 3. Assessment

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## Week 5 :

### 1. Overview of Wealth Management

- › Introduction to Wealth Management
- › Wealth Management: Private and Institutional
- › Considerations / Information to be obtained from client investor to devise a suitable financial plan
- › Defining Constraints for Private clients
- › Assessing risk tolerance level for individual client investor
- › IPS (Investment Policy statement) with a case study



## 2. Time Value of Money

- › Power of Compounding
  - › Future Value and Annuities using Mathematical equation and Excel
  - › Nominal & Effective Rate
  - › Present Value and Discounting process
  - › Application of PV in Loan Amortisation
  - › Perpetuities and growing annuities
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## Week 6 :

### 1. Economics Concepts

- › Macroeconomics - Interest Rates, Economic Growth, Money Supply\
- › Macroeconomics - Key Policy Rates
- › Macroeconomics - Monetary Policy Tools
- › Impact of Monetary Policies on Stock Markets
- › Key Economic Indicators
- › Industry Analysis and Business Cycles

### 2. Managing Taxes

- › Taxation Structure
- › Residential Status
- › Income Tax Slab & Important Deduction
- › Other Important on IT Deduction
- › Tax on Capital gain on sales of Assets
- › Special Taxation for Mutual Fund units
- › Fiscal Policy

### 3. Assessment

## Week 7 :

### 1. Portfolio Monitoring and Rebalancing

- › Types of risks and returns and their calculauon for equity market
- › Types of risks and their calculauon for debt/ bond/ money market
- › Types of risks and their calculauon for derivatives market
- › How to minimise risk/ diversificaion
- › Systematic and unsystematic risk and their measurement
- › Risk and return in a portfolio and measurement of varios risk adjusted returns,Absolute, Simple annualized and CAGR returns; Ways of reporting return and risk
- › Measurement of performance of a fund manager, investor return and manager's return and the calculation
- › CAPM and its application in portfolio construction
- › Portfolio review techniques and process; related documentation
- › Portfolio optimising techniques and rebalacing, use of var covar matrix
- › Scheme ratings and rankings, various models viz CRISIL, ICRA, Morningstar, Value Research

### 2. Portfolio Construction & Management

- › Model portfolio, scheme/product shortlisting using risk and return
- › deciding the optimum allocation
- › hedging strategies using derivatives
- › Presenting a portfolio plan
- › investment strategies, merits and shortcomings, strategical and tactical rebalancing

### 3. Assessment

## Week 8 :

1. Case Study
2. Project Assessment

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Scan this QR code with your smartphone and discover more information about the program

**FOR ENQUIRIES:**  
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