



**NISM Series V-A Mutual  
Fund Distributors  
Certification**

## Table of Contents:

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- › Fundamentals of Mutual Funds
- › Distribution & Investor Services

## Program Overview:

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Becoming a mutual fund distributor is a rewarding journey that requires achieving NISM V A certification. This entails rigorous training, understanding market dynamics, and adhering to ethical practices. The mutual fund course equips individuals with the expertise to guide investors wisely, fostering their financial well-being and promoting informed investment decisions

## Program Features:

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- › Self-Paced videos
- › Live Classes & Doubt Clearing Sessions
- › Industry Based Case Studies
- › Assignments & Quizzes
- › Project Assessment

## Mode of Delivery

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- › Self-Paced Videos - **4 Hours**
- › Live Lectures - **4 Hours**
- › Short Learning Material - **18 Hours**
- › Capstone Project/Case Study - **2 Hours**
- › Assessments & Assignments - **2 Hours**

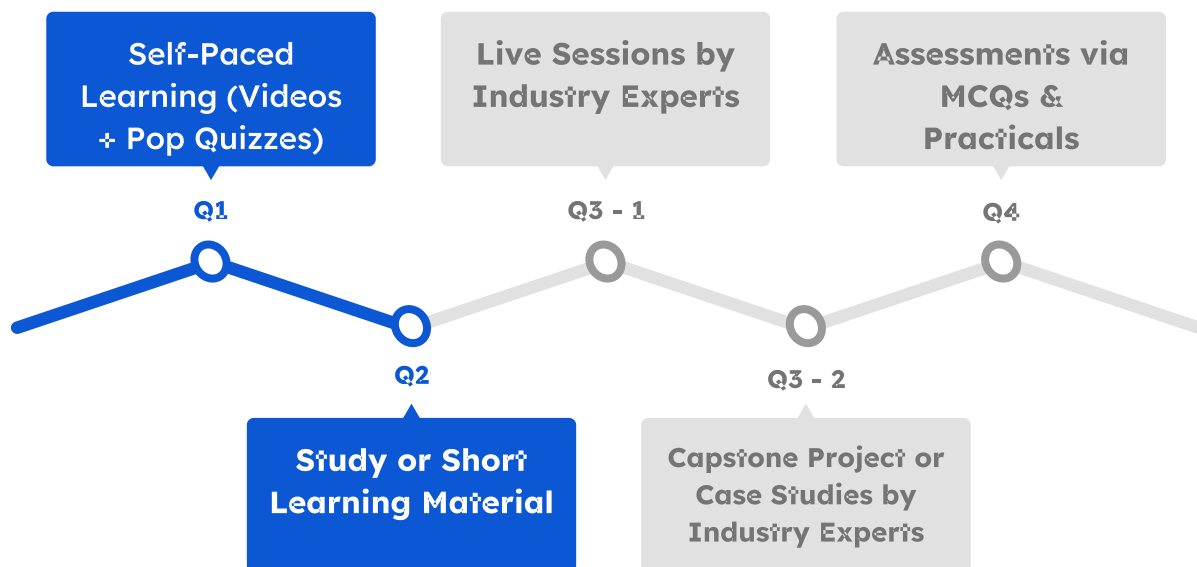
## Instructor Details



### 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



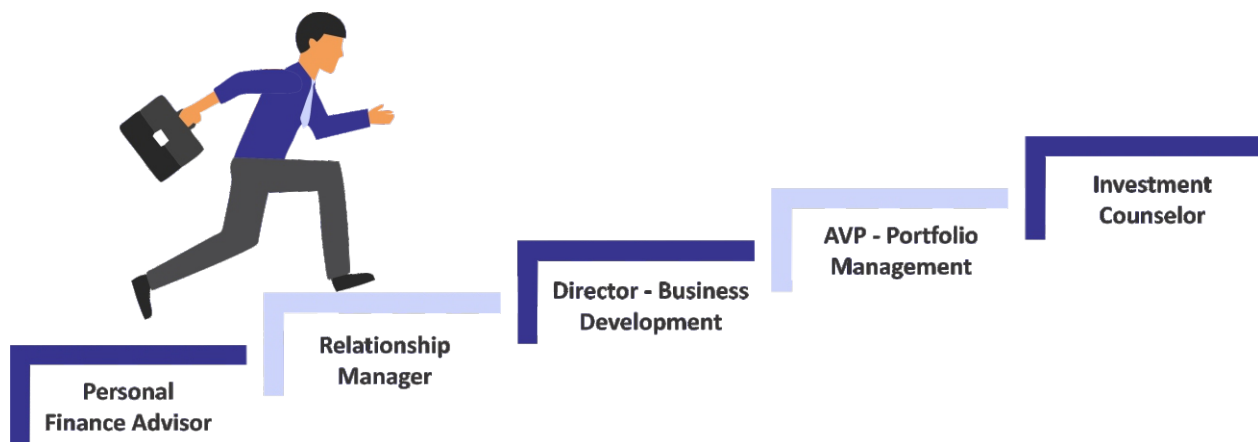
## Program Ideal For

- › Ideal for aspiring mutual fund distributors
- › Students seeking to enter the mutual fund industry as financial advisors or wealth managers
- › Students who want to enhance their knowledge of mutual fund products
- › Students Interested in regulatory frameworks, and ethical practices to provide informed investment advice.

## Learning Outcomes

- › Understanding of Mutual Funds
- › Regulatory Framework
- › Types of Mutual Funds
- › Fund Management
- › Risk and Return
- › NAV Calculation
- › Distribution and Sales Practices
- › Investor Services
- › Legal and Regulatory Requirements
- › Financial Planning

## Your Pathway To Success!



# Course Details

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## Week 1 :

1. Evaluate the Investment
2. Concept & Role of Mutual Funds
3. Legal Structure of Mutual Fund in India
4. Legal & Regulatory Framework
5. Scheme Related Information
6. Fund Distribution & Channel Management Practices
7. Assets Value, Total Expense Ratio & Pricing of Unit
8. Live Sessions

## Week 2 :

1. Evaluate the Investment
2. Concept & Role of Mutual Funds
3. Legal Structure of Mutual Fund in India
4. Legal & Regulatory Framework
5. Scheme Related Information
6. Fund Distribution & Channel Management Practices
7. Assets Value, Total Expense Ratio & Pricing of Unit
8. Live Session

## Week 3 and 4 :

1. 10 Practice Tests

## Week 5 :

1. Case Study - Mutual Fund Investment, Redemption and Taxation (4 hours)
2. Project Assessment

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

**FOR ENQUIRIES:**  
**CALL +91 73040 02635**

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