WEALTH & INVESTMENT MANAGEMENT PRODEGREE

IMARTICUS LEARNING

MOTILAL OSWAL Asset Management

CURRICULUM

Semester 1: Building Blocks of Wealth Management — 68 Hours

Global Financial Markets **8 Hours**	Introduction to Capital Markets | Role of Market Participants | Types of Markets - By Products | Types of Markets - By Regulations | Risk and Surveillance in Markets
Accounting and Financial Mathematics for Wealth Managers **12 Hours**	Accounts Terminology | The Principles and Concepts Underpinning the Four Key Elements of Accounts - Assets, Liabilities, Income, and Expenses | Power of Compounding | Time Value of Money | NPV and IRR | EMI and Other Modes of Repayment | Double Eentry Book-keeping | Methods of Depreciation | Valuation of Inventory | Profit and Loss Accounts & Balance Sheets
Financial Statement Analysis **8 Hours**	Key Financial Accounting and Reporting Issues | Analysis and Interpretation of Financial Statements | International Accounting Standards | Financial Ratios | Profitability Analysis | Cash Flow Analysis | Credit Risk Analysis | Off-balance Sheet Transactions | Intangible Assets | Revenue Recognition | Foreign Exchange Accounting
Macroeconomics **8 Hours**	Economics and Investment Advice | GDP and GNP | Expenditure Approach | Income Approach | Value Added Approach | Economic Cycles | International Trade and Trade Competitiveness | Balance of Payment | Money Supply | Inflation | Fiscal Policy & Monetary Policy | Private Borrowing, Investment and Expenditure | Central Banks & Macro Economic Tools
Types of Investment Assets **12 Hours**	Equities | Currencies | Fixed Income | Commodities | Alternative Investment | Portfolio Management Services | Index Linked Debenture | Real Estate | Aspirational Assets | Post Office Savings Schemes | National Savings Certificate | PPF | Senior Citizen's Savings Scheme | Infrastructure and Tax Savings Bond
Quantitative Methods for Investment Analysis **8 Hours**	Techniques in Data Analysis with Special Reference to Investment | Identification of Appropriate Techniques | Execution of Analysis and Sound Interpretation of Results | Probability Distributions | Confidence Interval Estimation | Hypothesis Testing | Correlation and Regression Analysis | Time Series Analysis
Corporate Finance **8 Hours**	Financial Analysis and Planning | Capital Budgeting | Cost of Capital | Capital Structure and Dividend Policy | IPOs | Mergers & Acquisitions | Corporate Restructuring
Project Submission #1 **4 Hours**	Project Submission in Front of Your Peers While Industry Experts Evaluate Your Project Work with Constructive Criticism

Semester 2: Wealth Management — 32 Hours

Corporate Ethics **4 Hours**	Importance of Ethical Practices in Wealth Management | Ethics Surrounding Financial Management, Product Safety, Corporate Responsibility | Regulations that Prohibit Unethical Practices in this Domain | Examples of Ethical Dilemmas and the Principles that Drive Them | Four-step Approach to Resolve Ethical Dilemmas
Investment Advisers Law **2 Hours**	Regulation of Financial Advisers and Wealth Managers | Negligence Liability | Contractual Liability | International Legal Issues in Financial Advice Contracts
Analysis of Equities **10 Hours**	Equity as an Asset Class | Equity Valuation Techniques for Specific industries and/or Companies | Absolute and Relative Valuation Approaches using Asset Values, Earnings, Dividends, Cash Flows | Fundamental Analysis | Technical Analysis | Corporate Action | Risk Management
Analysis of Fixed Income **12 Hours**	Fixed Income Markets and Products | Basic Analytical Tools used | Term Structure of Interest Rates, Yield Curve Dynamics | Duration and Convexity | Bond Portfolio Management Strategies | Credit Rating | High Yield Bonds | Bond Theorems and Strategies | Asset-backed Securities | Swaps and Credit Derivatives | Risk Management
Project Submission #2 **4 Hours**	Project Submission in Front of Your Peers While Industry Experts Evaluate Your Project Work with Constructive Criticism

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CURRICULUM

Semester 3: Specialization of Wealth Management	52 Hours
Basics of Derivatives **8 Hours**	Demystifying Derivatives | Understanding Their Characteristics | Types of Derivatives | Features of Derivative Instruments
Portfolio Construction, Review, Monitoring **8 Hours**	Portfolio Construction | Constraints to Asset Allocation | Application of Portfolio Objective | Strategic Asset Allocation | Tactical Asset Allocation | Dynamic Asset Allocation
Portfolio Management **12 Hours**	Active Portfolio Management | Advanced Concepts of Investments and Their Applications | Analyses of the Contemporary Investing Scene and Global Capital Markets
Wealth Planning **4 Hours**	Multi-jurisdiction Legislation for International Wealth Transfers | Use of Trusts in Inter-generation Wealth Planning
Investment Planning Framework **12 Hours**	Taxation of Investments | Tax Benefits | Tax Exempt Investment Scheme | Withholding Tax | Wealth Tax | Estate Planning | Legal Framework | Regulations | Investment Advisor consideration | AML | KYC and Risk Profiling | Ethical Dilemmas | Investment Risk
Financial Protection Planning **8 Hours**	Insurable Risk | Life Insurance | Personal and Family and Business Financial Protection Products
Project Submission #3 **4 Hours**	Project Submission in Front of Your Peers While Industry Experts Evaluate Your Project Work with Constructive Criticism

Semester 4: Global Wealth Outlook	48 Hours
Wealth Management Trends **4 Hours**	Serving the Wealthiest -The UHNWI (Ultra High Networth Individuals) | Family Businesses Structures and Management | Linkage of Private Banking and Asset Management | Emerging Trends
FinTech **4 Hours**	Robo-Advisory | Pensions | Savings | PFM | Brokers | Data | B2B Platforms
Alternative Investments **4 Hours**	Private Equity | Real Estate | Commodities
Structured Products - Basics **8 Hours**	Key Characteristics - Maturity, Cash-Settled Returns, Credit Claim on Issuer | Basic Structures - Participation, Downside Protection, Capped Upside | Life Cycle of Structured Products - Idea, Issuance and Maturity | Keys Elements in Creating SPs - Principal Guarantee, Income or Growth, Choice of Underlying | Assets, Certainty of Maturity
Structured Products - Advanced **8 Hours**	Use of Structured Products | Equity Structures | Fixed Income Structures | Currency Structures | Commodity Structures | Hedge Fund Wrappers | Derivatives-like Warrants | Option-embedded Bonds | Equity-linked Notes | Dual Currency Options | Reverse Floaters | Return and Structuring of these Products
Relationship Management **8 Hours**	Advanced Communication Skills | Negotiation Skills | Handling Angry Customers | Conflict Management | Excellence in Relationship Management
Project Submission #4 **4 Hours**	Project Submission in Front of Your Peers While Industry Experts Evaluate Your Project Work with Constructive Criticism
Interview Preparation - Domain **4 Hours**	Analytics Experts Guide Youon How to Prepare for Technical Interview Round with Tips, Tricksanda Quick Refresher on Concepts Learnt
Mock Interviews - HR and Domain **4 Hours**	1:1 or Panel Mock Interviews with Industry Veterans to Clear the HR and Technical Round of Interviews to Give You Confidence to Face Real World Scenarios