

# BANKING & WEALTH MANAGEMENT BOOTCAMP

- ✓ Assured Placements with Guaranteed Interview Opportunities
- ✓ Ideal for Careers in Banking and Wealth Management
- ✓ Flexible Weekday/Weekend Program for Freshers/Experienced
- ✓ Mentorship by Industry Experts
- ✓ Pay Your Program Fee Through EMI's

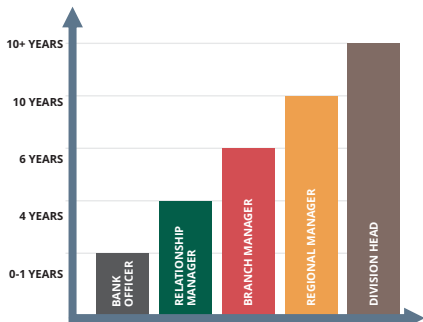
# INDUSTRY LANDSCAPE

## SEVERE SHORTAGE OF WEALTH MANAGERS:

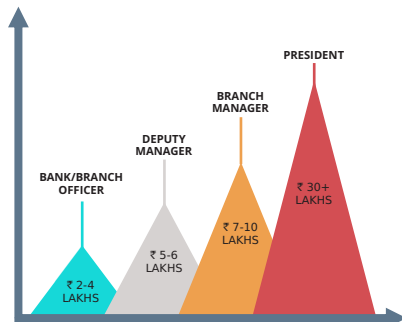
1 CRORE INVESTORS AND  
ONLY 25,000 RMS

ONLY AROUND 1000  
HIGHLY SKILLED WEALTH  
MANAGERS IN INDIA

CAREER TRAJECTORY



AVERAGE SALARY



## OVERVIEW OF PROGRAM

The Banking and Wealth Management Bootcamp is a comprehensive placement-focused 180-hour program for careers in wealth management, investment planning, banking and financial advisory roles.

### MACROECONOMICS

7%

### FINANCE

19%

### RETAIL BANKING

19%

### CORPORATE BANKING

5%

### NBFCs

5%

### WEALTH MANAGEMENT

26%

### IBM WATSON

8%

### JOB READINESS

12%

## CURRICULUM

### SEMESTER 1: FINANCE PRIMER

#### MACROECONOMICS

##### FINANCE & FINANCIAL SECTOR

Need for Capital in an Economy | Method of Capital Formation | Harnessing of Capital | Role of Financial Sector in Intermediation of Flows

##### ECONOMIC SYSTEM

Economics and Investment Advice | GDP and GNP | Measuring GDP | Expenditure Approach | Income Approach | Value Added Approach | Nominal Vs Real GDP | Key Macroeconomic concepts | Private Borrowing, Investment and Expenditure | Central Banks & Macro Economic Tools

##### FUNDAMENTALS OF GLOBAL FINANCIAL MARKETS

Introduction to Capital Markets | Role of Market Participants | Types of Markets - By Products | Types of Markets - By Regulations | Risk and Surveillance in Markets

#### FINANCE

##### FINANCIAL PRODUCTS

Equities - trading | Currencies | Fixed Income | Commodities | Derivatives - Futures, Forwards Options

##### OTHER INVESTMENTS

Alternative Investments | Portfolio Management Services | Index Linked Debenture | Real Estate | Private Equity | Venture Capital | Aspirational Assets | Post Office Savings Schemes | National Savings Certificate | Public Provident Fund | Senior Citizen's Savings Scheme | New Pension Scheme | Infrastructure and Tax Savings Bond

#### FINANCIAL ANALYSIS

##### READING FINANCIAL STATEMENTS

Financial Statements - Balance Sheet, Profit & Loss and Cash Flow | Understanding Revenues and Expenses | Transaction Analysis | The Recording Process

##### RATIOS

Introduction to Ratio Analysis | Objectives of Ratio Analysis | Dupont Analysis | Types of Ratios | Profitability Ratios | Activity Ratios | Liquidity Ratios | Solvency Ratios | Valuation Ratios | Limitations of Ratios

# CURRICULUM

## ACCOUNTING & FINANCIAL MATHEMATICS FOR WEALTH MANAGERS

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 Entry Book-keeping | Methods of Depreciation | Valuation of Inventory | Profit and Loss Accounts & Balance Sheets

## CORPORATE FINANCE

Financial Analysis and Planning | Capital Budgeting | Cost of Capital | Capital Structure and Dividend Policy | IPOs | Mergers & Acquisitions | Corporate Restructuring

## SEMESTER 2: BANKING

### BANKING PRIMER

#### INTRODUCTION TO BANKING SYSTEM

Nature of Intermediation by Banks in Financial Sector | Structure of Banking – How Banks Function | Types of Banks: Commercial Banking, Retail Banking | Global Banking Systems

#### CENTRAL BANK AND REGULATION

Role of Central Bank | Banking Regulation | Reserve Bank and its Functions

### RETAIL BANKING

#### RETAIL BANKING

Overview of Retail Banking | How is it Different | Individual/Entity - Trust, Society, Partnership, Proprietorship/Pvt Ltd/Public limited companies/HUF/KYC of each entity | Asset Products | Deposit Products Process

#### DEPOSIT PRODUCTS & OPERATIONS

Checking/Saving/Certificate of Deposits | Deposit Account Operations | Interest Calculations in Deposit Accounts | Third Party Products & Services | Mfs/Insurance Products/Financial Planning | Operations and Transactions in Deposit Accounts | Regulations Governing Deposit Product

#### RETAIL LENDING – LOAN PRODUCTS & OPERATIONS

Types of loans - Secured & Unsecured | Understanding terms related to loans | Pledge/hypothecation, mortgage | Documentation in loan proposals | Relevance of information in documents | Repayment of loans | Collections | NPA classification

#### OTHER PRODUCTS & SERVICES

Types of Cards | Digital and Other Types of Banking | Payments and Fund Transfers Investments Solutions | Cash Transactions | Basics of a Cheque - Parties and Implications | Features of a Negotiable Instrument | Types of Cheque & its Implications | Cash Withdrawals using Cheques | Due Diligence

#### MOBILE BANKING

Overview and Brief History | Product Features and Diversity | IMPS | Profitability of Mobile Banking | Risk Management and Frauds | Back End Operations and Technology

#### INTERNET BANKING

Overview and Brief History | Product Features | Corporate and Individual Internet Banking | Integration with e-Commerce Merchant sites | Profitability of Internet Banking | Risk Management and Frauds | Back End Operations and Technology

### CORPORATE BANKING

#### INTRODUCTION TO CORPORATE BANKING

Basic Eight Banking Business Lines | What is Corporate Banking | Features of Corporate Banking | Corporate Banking Credit Assessment Process | Complete Corporate Loans Life Cycle | Corporate Banking Products

#### DEBT PRODUCTS

Categorization of Debt Products | Types of Working Capital Loans | Computing a Company's Working Capital Needs | Capital Expenditure (Capex) Loans | Project Finance Loans | Trade Finance | Term Loans | Refinancing | Structured Finance | Agricultural/Rural Loans | MSME Loans

#### LIABILITY PRODUCTS

Current Accounts and its Features | Fixed Deposits (FD) | Salary Accounts | Account Monitoring

### NBFC

#### OVERVIEW OF NON-BANKING FINANCIAL COMPANIES (NBFC)

Overview of NBFCs | How are they different from Banks? | Types of NBFCs | Overview of NBFC Products | Fintech in the NBFC sector

#### PRODUCTS, CLASSIFICATION, FUNDING

NBFC Overview | Classification of NBFCs | Products Portfolio of NBFCs + funding

#### DIGITAL INNOVATIONS IN NBFCs

Customer Data Acquisition and Management | Introducing Customised Products | Savvy Customer Reach & Expansion of Customer Base | Better Customer Service Offering | Lower Costs with Digitisation

## SEMESTER 3: WEALTH MANAGEMENT

### WEALTH MANAGEMENT

#### INTRODUCTION TO WEALTH MANAGEMENT

The Concept of Wealth & Savings | What is Wealth Management? | Evolution | Types & Differentiation | Equity | Fixed Income | Derivatives | Important Terms | Roles a Wealth Manager Plays

# CURRICULUM

INTRODUCTION TO WEALTH MANAGEMENT	The Concept of Wealth & Savings   What is Wealth Management?   Evolution   Types & Differentiation   Equity   Fixed Income   Derivatives   Important Terms   Roles a Wealth Manager Plays
EQUITY STOCK SELECTION PROCESS	Equity as an Asset Class   Fundamental Analysis and Technical Analysis   Corporate Action
FIXED INCOME SECURITIES - INVESTMENT EVALUATION	Fixed Income Securities   Risks   Bond Strategies and Bond Theorems   Duration   Modified Duration   Weighted Average Maturity   Yield Curve
MUTUAL FUNDS	Mutual Fund Basics and Structure   Legal & Regulatory Environment   Offer Document   Fund Distribution   Selecting the Right Mutual Fund
DEPOSITORY OPERATIONS	Basics of The Indian Securities Market and The Depository System   The Need for & Features of Depository System in India   Structure of The Depository System in India   Regulatory Framework   Eligibility Criteria   Registration Procedure   Rights and Obligations Etc   Functions of The Depository and its Depository Participants (DPs)
FINANCIAL PLANNING	Principles of Financial Planning   Defining Client Advisor Relationship   Financial Planning Process   Investment Objectives and Strategy   Investor Risk Management   Investment Calculations   Lifetime Cash Flow Projections   Financial Goals   Asset Allocation   Diversification of Portfolio & Model Portfolios   Personal Financial Ratios   Inflation Adjusted/Tax Adjusted Return   Relationship Manager Reporting
PORTFOLIO MANAGEMENT	Portfolio Construction   Constraints to Asset Allocation   Application of Portfolio Objective   Types of Asset Allocation
MEASURES OF RETURN	Absolute Return   Holding Period Return   Relative Return   CAGR   Rolling Return
RETIREMENT PLANNING	Introduction to Pension Industry   National Pension System, PPF and Insurance Company Schemes   Mutual Fund Schemes   Defined Benefit Schemes and Defined Contribution Scheme   Monthly Income Plan, Senior Citizen Scheme and Reverse Mortgage   Impact of Intended Retirement Age   Stages to Generate Retirement Income   Estimating Retirement Corpus
INVESTMENT PLANNING FRAMEWORK	Taxation of Investments   Tax Benefits and Tax Exempt Investment Schemes   Withholding Tax and Estate Planning   Legal Framework and Regulations   Investment Advisor Consideration   AML, KYC and Risk Profiling   Ethical Dilemmas and Investment Risk

## SEMESTER 4: RISK, COMPLIANCE AND JOB READINESS

### RISK MANAGEMENT

BANKING RISKS & TYPES	Risk in Banking - A Background   Sources of Risk for A Banking Corporation   Types of Risk   Systematic Risk   Unsystematic Risk   Interest Rate Risk   Inflation Risk   Currency Risk   Credit Risk   Liquidity Risk
MARKET RISK	What is Market Risk   Measuring Market Risk   VaR/Monte Carlo Simulation   Understanding Volatility   MTM Model

### REGULATORY FRAMEWORK

LAW AND PRACTICE OF BANKING	Law and Practice of Banking   Role of RBI, SEBI & IRDA   Supervisory Functions of RBI, Monetary Policy, Repo, Reverse Repo, CRR, SLR, LAF, MSF   Three Pillars of Basel, Components of Capital as per Basel   Role and Objective of Banking Codes and Standards Boards of India
ANTI-MONEY LAUNDERING	Introduction to Money Laundering   The Three Stages of Money Laundering   Placement and the Methods Adopted   Layering and Methods Adopted   Integration of Money into the Economy and its Outcomes   Methods of Money Laundering

### JOB READINESS

COMMUNICATION SKILLS	Types of Communication   Personal Communication   Business Communication   Business Etiquette
CUSTOMER SERVICE	What is Customer Service?   Developing a Customer   Centric Mind Set   Internal Customers External Customers   The Need for Customer Service   Unpleasant Experiences   Satisfying Experiences   Developing a Customer Friendly Attitude   Presenting a Professional Image   Tone & Choice of Words   Mastering Telephone Skills
RESUME WRITING	The Why, The What and The How of Resumes   Personal Branding   Tips and Resources   Interview Skills   Using Social Media   CV Discussion
INTERVIEW PREPARATION - HR	Interview Preparation   Stage 1 - Preparation   Stage 2 - First Impressions Count   Stage 3 - The Interview   Stage 4 - The Final Stage   Questions You May Wish to Ask   How to Ace The 50 Most Common Interview Questions
MOCK INTERVIEWS - HR AND DOMAIN	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

## KEY HIGHLIGHTS



### INDUSTRY ENDORSED

Comprehensive coverage of the banking and wealth management industry, products and operations.

### PLACEMENT ASSURANCE

Guaranteed interview opportunities and placements at leading banks, NBFCs and wealth and investment management firms.



### CAREER SERVICES

We thoroughly prepare you for careers in banking and wealth management firms through personal development modules, mock interviews and resume building workshops.

### MENTORSHIP

Industry experts from leading companies act as your personal mentor to advise and guide you in your journey towards job-readiness.



### EXPERIENTIAL LEARNING

The course is delivered using a combination of classroom lectures, case studies, project work and simulations. This program also features interaction with prominent guest lecturers that will deepen your understanding of key concepts.

### SMART CLASSROOM

Learning via technologically-enhanced classroom training, supplemented by lecture recording.



### LEARNING MANAGEMENT SYSTEM

Aside from classroom sessions, our state-of-the-art online portal centralizes learning with 24/7 access to study material, learning aids and tests.

## PLACEMENT PARTNERS

and more...

# FACULTY

## JYOTI THIMMAPPAIAH

Jyoti has over 14 years of banking experience in various positions of increasing responsibility. She has worked for e-serve international ltd. as the regional manager and later moved on to HDFC Bank for 8 years as deputy vice president, where she was responsible for ensuring that the prescribed service excellence standards and business goals of the unit are consistently achieved for over 300 staff members. Her areas of specialization are customer service, retail banking, target orientation, and sales management. Jyoti is an M.Com in banking from ksou, Mysore.

## AJITH WALIYA

Ajith has 10+ years of experience in sales, marketing and product management of financial products. He has previously worked as investment advisor. Equities & private banking at hdfc bank; sales manager: structured products, fixed income products, real estate portfolios and mutual funds at icici prudential asset Management Company; and relationship manager for salary accounts at icici bank, as well as senior manager – sales for ing investments Pvt. Ltd. He currently leads imarticus' training on banking and wealth management across the south region.

## SIDDHARTHA SHARMA

A career banker with 13+ years of experience in retail assets and liabilities at leadership level. In-depth understanding of retail asset products like home loans, loans against property, loan against gold, and banking products propositions like cms and corporate linked products. End-to-end understanding of retail asset products ranging from product sourcing or origination of product to credit appraisal and even collections and resolution of npas. Sound understanding of legal and business eco-system along with accurate estimation of competition.

## PLACEMENT SERVICES



### 1 RESUME BUILDING

Refining and polishing the candidate's resume with insider tips to help them land their dream job



### 2 INTERVIEW PREP

Preparing candidates to ace HR and Technical interview rounds with model interview questions and answers



### 3 MOCK INTERVIEWS

Preparing candidates to face interview scenarios through 1:1 and panel mock interviews with industry veterans

## BATCH OPTIONS

**2 MONTHS**  
WEEKDAY PROGRAM

**3.5 MONTHS**  
WEEKDAY PROGRAM

## OUR CAMPUSES

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