

CAREERS IN SECURITIES AND INVESTMENT BANKING



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LEARNING

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AWARDS & ALLIANCES

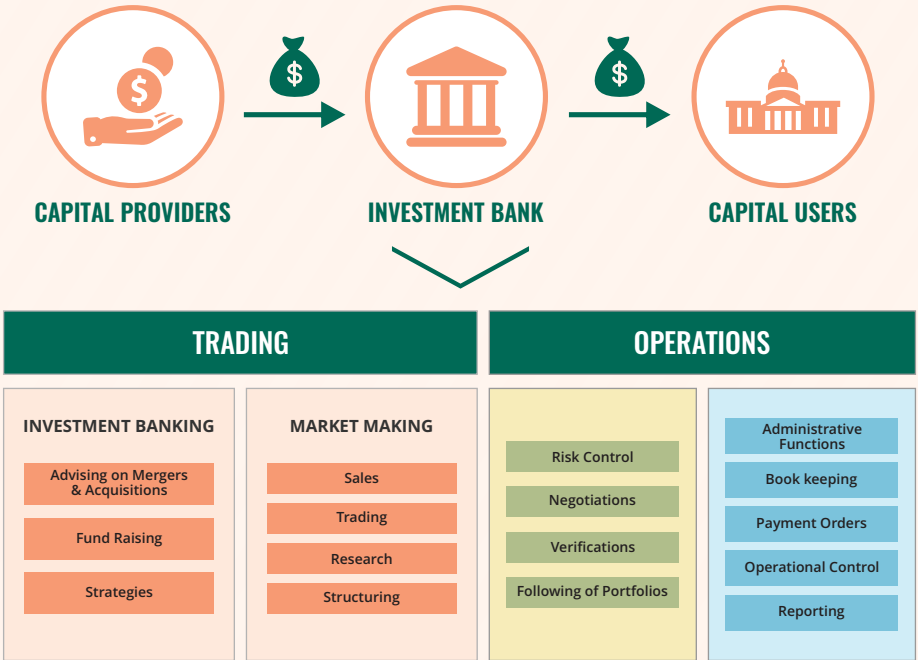


Approved by Government of India

INVESTMENT BANKING LANDSCAPE

WHAT IS INVESTMENT BANKING?

Investment banks assist corporations and governments in raising capital by underwriting and acting as the agent/underwriter in the issuance of securities. They act as intermediaries between companies who want to raise money and investors that want to invest money

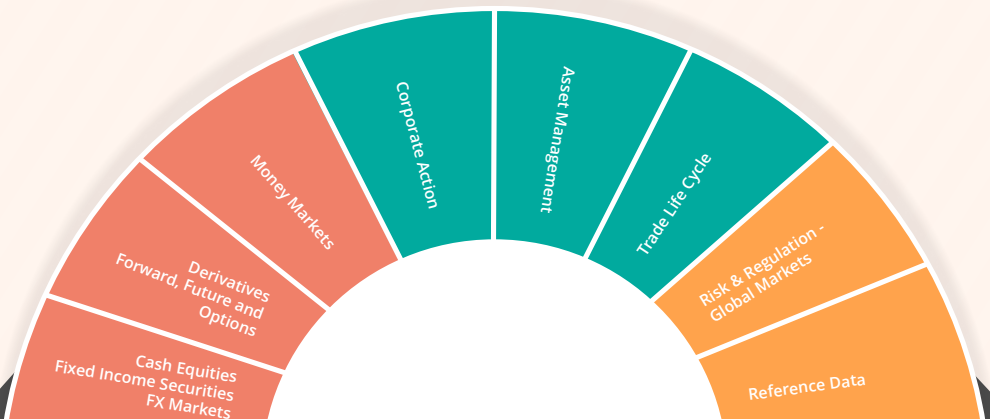


Why Investment Banking?



OVERVIEW OF PROGRAM

Imarticus Learning offers the CIBOP Program designed for careers in Financial Operations, Treasury and Clearing divisions within an Investment Bank. The program helps you to learn about various product lines, and gain a detailed understanding of the trade lifecycle across products and regions



CERTIFIED INVESTMENT BANKING OPERATIONS
180-HOUR CERTIFICATION WITH PLACEMENT

CURRICULUM

LEVEL 1

INTRODUCTION TO INVESTMENT BANK & FINANCIAL SYSTEM

Introduction to IB and their Different Business Lines | Introduction to the Financial System | Types of Financial Markets & Different Market Participants & Regulatory Agencies | Introduction to Investment Banks - Buy Side & Sell side of Business

INTRODUCTION TO CASH EQUITIES

Equity & Preference Shares- Features, Advantages and Disadvantages | Depository Receipts - Types of ADR, Advantages of ADR and GDR, Difference between ADR and GDR | Primary & Secondary Markets | Issuance/Trading | IPO Process – US & Indian Markets | Stock Exchanges & Financial Centre's of the World | Trade Economics for Equity Markets

INTRODUCTION TO FIXED INCOME SECURITIES

Fixed Income & Advantages of Fixed income products | Bonds and its Characteristics, Types of Bonds | Relation Between Interest Rate and Bond Price & Yield and Bond Price | Current Yield, YTM, Clean price, Dirty Price, Accrued Interest | Process of Securitization – MBS & ABS | Discussion on Credit Crisis

INTRODUCTION TO FOREIGN EXCHANGE MARKET

What is FX, Features of FX | Difference Between FX & Futures | Market Participants | Types of Quotations | Type of FX Trade - Cash, Spot, Tomm, NDF, Forward | Trade Economics of FX Transactions | FX Future and Options

DERIVATIVES – FORWARD, FUTURE AND OPTIONS

Derivatives – An Introduction | Difference between OTC & ET Derivatives | Value of Derivatives | Forwards Contracts, Futures Contract | Futures Price determination | Margins in Futures | Futures Settlement | Futures Payoffs | Definition of Options | Types of Options | Trade Economics of Options | Option Premiums | Types of Option Payoffs | Options Pricing | Styles of Exercising Options

DERIVATIVES – SWAPS

Introduction to Swaps | Interest Rate Swap, Terminologies Involved, IRS Application – Hedging, Speculation | Equity Swap, Terminology Associated with EQS, EQS Application – Hedging, Speculation | FX Swap – Terminologies Involved in FX Swaps. Examples of Hedging and Speculation in FX Swaps | Credit Default Swap, Settlements, Credit Events, Types, Terminologies | Currency Swaps - Terminologies Involved in Currency Swaps. Examples of Hedging and Speculation in Currency Swaps | Settlement Process of IRS, EQ, CDS, FX and Currency Swaps | Trade Economics of IRS, EQ, CDS, FX and Currency Swaps

INTRODUCTION TO MONEY MARKET

Instruments of Money Market | Interbank Lending, T-Bills, Certificate of Deposit, Commercial Paper, Repo | Advantages & Disadvantages of Money Markets | Difference between Capital & Money Markets

SOFT-SKILL TRAINING

Effective Communication | Resume Building | Presentation Skills | Interpersonal Skills

LEVEL 2

CORPORATE ACTION

What is Corporate Action | Purpose of Corporate Action | Types of Corporate Actions | Important Dates in Corporate Actions | Trade life Cycle in Corporate Action Events

ASSET MANAGEMENT

What is Asset Management | Structure of Mutual funds | Difference between an Open-Ended and Close-Ended Scheme | Hedge Funds | Structure of Hedge Funds | Hedge Fund Operations | Roles & Activities | Fund Administration | Fund Accounting | Management Fee and Performance Fee | Formula to Calculate NAV

CURRICULUM

REFERENCE DATA MANAGEMENT

Introduction to Reference Data Management | Why Reference Data Management | Static Data OMGEO, SWIFT & Markit | Securities Identification Numbers | Instrument Set-up | Investor Set-up | SSI Set-up | Counter Party Identifiers | Other Reference Data Example

RECONCILIATION

Definition | Position within the TLC | Different Types of Reconciliations : Nostro, Depot, Trade, Exchange, Static Data, Intra and Inter Recon | Lifecycle of Typical Reconciliation Process | Risks Addressed by Reconciliation | Integrity of the Reconciliation Framework

INTRODUCTION TO ISDA

Role of ISDA | Architecture | Hierarchy | ISDA Master Agreement | Provisions | Schedule | Various ISDA Documents | Confirmations | Best Practices

TRADE LIFE CYCLE & SETTLEMENTS PROCESS

Trade Life Cycle (TLC) – Exchange Traded Product TLC & OTC Product TLC Simulation

STOCK BORROWING AND LENDING

Securities Lending and Borrowing | Market Participants of SBL | Sorts of Securities Traded in SBL | Triplicate SBL | Benefits and Disadvantages of Trading in SBL | Stock Lending Difference from Repo | Reasons for SBL | Difference between SBL/SLB and Repo | What is Collateral? | Types & Participants of Collateral Management | Process in Collateral Management | Key Terms in Collateral Management | Advantages & Disadvantages of Collateral Agreements

PERSONALITY DEVELOPMENT SESSION

Presentation on Domain Topics | Group Discussion | Interview Preparation & CV Discussion | Interview Preparation | HR mocks

LEVEL 3

RISK & REGULATION – GLOBAL MARKETS

What is Risk | Types of Risk - Market Risk, Credit Risk, Liquidity Risk, Operational Risk | How to avoid Market Risk, Credit Risk and Liquidity Risk | Major causes of Operational Risk | How to Avoid Operational Risk | Regulatory Environment | Dodd-Frank Act (DFA) | European Market Infrastructure Regulation (EMIR) | Markets in Financial Instruments Directive (MiFID) | Markets in Financial Instruments Directive II (MiFID)

ANTI-MONEY LAUNDERING & KNOW YOUR CUSTOMER

Background of AML/KYC | Case Studies in Money Laundering | Three Stages of Money Laundering | Placement and the Methods Adopted | Layering and Methods Adopted | Need for KYC | Customer Acceptance Policy | Customer Identification Procedure | Due Diligence | Monitoring of Accounts and Transactions

BASIC EXCEL

Basic of Excel | Data Validations | Look-up Functions | Pivot Table | Functions | Macros

INTERVIEW PREPARATION

Domain Mocks and HR Mocks | Interview Readiness

ELECTIVE CERTIFICATION

**ADVANCED DERIVATIVES
CERTIFICATION**

**INVESTMENT OPERATIONS
CERTIFICATION (IOC) TRAINING**

KEY HIGHLIGHTS



COMPREHENSIVE COVERAGE

The internationally-accredited Certified Investment Banking Operations Professional (CIBOP) program is designed for careers in the Capital Market Operations division within an Investment Bank. This 180-Hour program provides you an in-depth understanding of complex financial products and their Trade Lifecycles, along with Operational Risk and Regulations

EXPERIENTIAL LEARNING

The program is delivered using a combination of classroom lectures, case studies, project work and simulations. Each module is centered on case studies to ensure learning that will set you apart from your peers during interviews and on the job. The program will feature interaction with prominent guest lecturers, which will deepen the understanding of the concepts learnt



CERTIFICATIONS

In addition to the CIBOP certificate from Imarticus, the program will also thoroughly prepare you to clear internationally renowned certifications, which will accelerate your career path in the Financial Services space. CISI Investment Operations Certificate (IOC), ICMA Operations Certificate Programme, ACI Operations Certificate amongst others

COMPLEMENTARY VIDEOS

Students will receive 30 Hours of engaging self-paced Instructor-led video recordings on topics they learnt about as additional reinforcement. These videos offer you the flexibility to learn what you want when you want it.



24/7 LEARNING

Aside from classroom sessions, our state of the art online portal centralizes learning with 24/7 access to study material, learning aids and tests. Faculty and students spread across locations connect, collaborate and share information, with corrective paths for improved learning

100% PLACEMENT ASSISTANCE & MENTORSHIP

Upon successful completion of the training we thoroughly prepare you for careers in Investment Banking through personal development modules, mock interviews, resume building and finally give you ample interview opportunities at Indian and Global Firms. Industry experts from leading companies advise and mentor students in their journey towards job-readiness



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



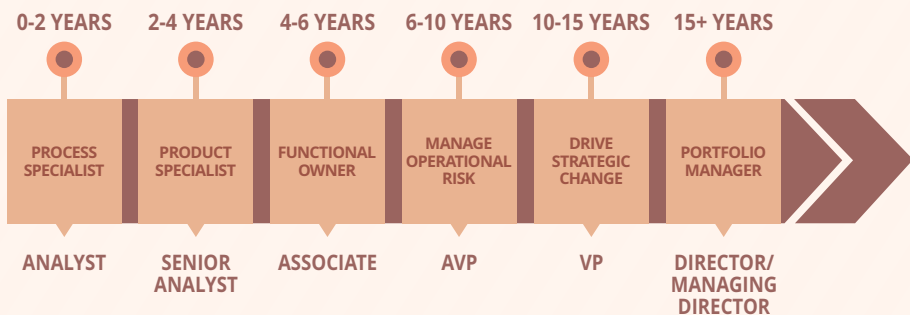
Preparing candidates to face interview scenarios through 1:1 and panel mock interviews with industry veterans

INTERVIEW OPPORTUNITIES

We will help you in getting Interview Opportunities in at Investment Bank and Financial Institutions through our corporate network

CAREERS & PLACEMENTS

TYPICAL CAREER PATH



STUDENTS PLACED



FACULTY

Our faculty comprises of dedicated experienced professionals from firms such as JP Morgan, Barclays, Deutsche Bank, Nomura and Citigroup. With extensive experience in Financial Services, our faculty is positioned to impart best-in-class training through innovative learning methods

HARISH THAKKAR

Harish is an advanced CISI certified trainer with over 20+ years of extensive experience in Investment Banking Operations and Training & Development. He has set up Training Academies for JP Morgan, Nomura and the Stockholding Corporation lead-trainer for the BFSI Content Development of NIS Sparta. Managing 300+ FTE's in Investment Research and IB Operations has given him an in-depth domain understanding of global capital markets

ABHINIT KUMAR

Abhinit has over 9 years' of experience in Investment Banking Operations across firms such as Goldman Sachs and Barclays. He has extensive knowledge of ISDA and CSA documents related to OTC derivatives. His domain expertise lies in Equities, Bonds and FX with excellent functional knowledge in Confirmations, Settlements & Collateral Management. Abhinit holds a degree in Engineering and a Capital Markets certification

DHARMESH DOSHI

Dharmesh Doshi has expertise in Equity, Derivatives, Fixed income securities, Money Market, Foreign Exchange, and their Trade Life Cycle. He has 14 years of work experience in managing high value projects & products in Financial Market domain. He is also a Certified Project Manager from [®]PMI USA and Certified ScrumMaster from Scrum Alliance UK

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