



# WEALTH & INVESTMENT MANAGEMENT BOOTCAMP

Knowledge Partner



**Industry leader in asset management and advisory services with an equity AUM of over Rs. 15400 Crores across mutual fund and portfolio management services**

Industry-Endorsed Program in Collaboration with Motilal Oswal Asset Management Company Ltd.

- ..... Comprehensive Curriculum Covering Financial Markets, Wealth Management, Investment & Portfolio Management, & Financial Advisory
- ..... 200-Hour Classroom Program Delivered at State-of-the-Art Learning Centers
- ..... Assured Placements at Leading Wealth and Investment Management Firms



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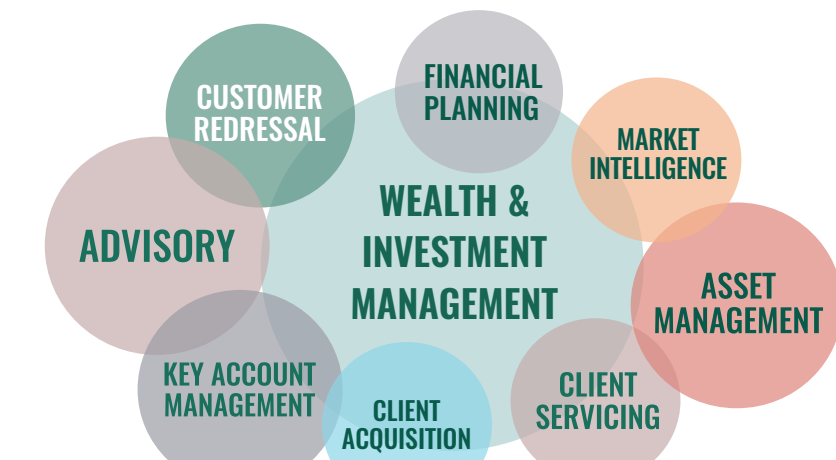
# INDUSTRY LANDSCAPE

## WEALTH MANAGEMENT



Wealth Management is an investment-advisory discipline that incorporates financial planning, investment portfolio management and a number of aggregated financial services.

## CAREERS IN WEALTH AND INVESTMENT MANAGEMENT



### JOB OPENINGS ON MONSTER (APRIL, 2017)

WEALTH MANAGEMENT  
**18,130**

FINANCIAL ADVISORS  
**13,326**

**#1 INDIA IS THE FASTEST  
GROWING MARKET FOR HNW**

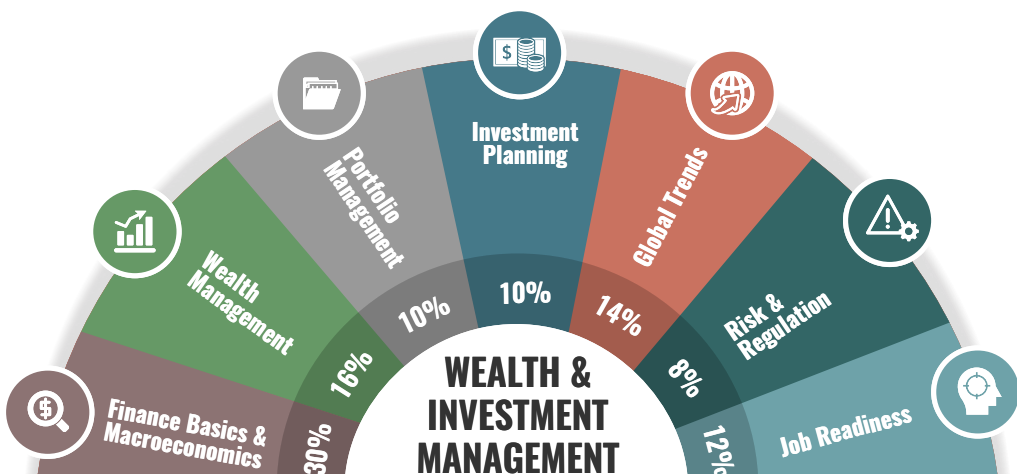
## EMPLOYMENT LANDSCAPE

- Motilal Oswal
- Edelweiss
- DSP BlackRock
- IDBI
- Deutsche Asset
- HSBC
- Citibank
- Reliance Capital
- Birla Sun Life
- Religare Wealth Mgmt

**AVERAGE SALARY  
OF A WEALTH AND  
RELATIONSHIP MANAGER  
₹5,00,000**

## OVERVIEW OF PROGRAM

The Wealth and Investment Management (WIM) Bootcamp, in association with Motilal Oswal Asset Management Company Ltd. as the Knowledge Partner, is a comprehensive placement-focused 200-hour program for careers in wealth management, investment planning and financial advisory roles.



## 200-HOUR INDUSTRY-ENDORSED PROGRAM

# 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 Entry 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

## 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 (7 HOURS)

Portfolio Construction | Constraints to Asset Allocation | Application of Portfolio Objective | Strategic Asset Allocation | Tactical Asset Allocation | Dynamic Asset Allocation

# CURRICULUM

## 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 (10 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 (5 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 | Key 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 You on How to Prepare for Technical Interview Round with Tips, Tricks and a 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

## HANDS-ON PROJECTS



**Financial Markets**



**Investment Products**



**Investment Planning**



**Portfolio Construction**



**Structured Products**



**Quantitative Methods for Investment Analysis**

**Learn the very latest in global Wealth Management trends and best practices to stay ahead of the curve**

## KEY HIGHLIGHTS



### ENDORSED BY MOTILAL OSWAL

The program is co-created with Motilal Oswal Asset Management Company Ltd. as the 'Knowledge Partner', and comes with a cutting edge, industry-aligned curriculum, guest lectures, mentorship and a practical hands-on learning methodology.

### COMPREHENSIVE COVERAGE

The program provides comprehensive knowledge on financial sector, accounting and financial mathematics, wealth management products & regulations, investment planning, portfolio management, global trends and new products for wealth managers, along with resume building and interview preparation.



### CERTIFICATIONS

In addition to the industry endorsed certification, which is co-branded with Motilal Oswal AMC, the program also thoroughly prepares you to clear two international certifications: CISI ICWIM and NISM Investment Adviser.

### MENTORSHIP

Industry experts with 15+ years of experience advise and mentor you in your journey towards job-readiness, with a dedicated mentor assigned to each student to clear doubts about the industry or your career prospects.



### 24/7 LEARNING

Our state of the art online portal provides 24/7 access to your study material, learning aids and tests. Stay in touch with students and faculty for continued learning and support.

### ASSURED PLACEMENTS

Students receive up to 5 interview opportunities and are placed at leading financial services and wealth managements firms through interview preparation, resume building sessions and mock interviews.



## TWO DELIVERY MODES TO CHOOSE FROM



#### CLASSROOM DELIVERY

Classroom training by expert faculty with industry credentials at our Imarticus centers



#### SELF PACED INSTRUCTOR VIDEOS

Active, self-paced, data-driven learning through HD videos

## FACULTY

### AJITH VALIYA

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. He currently works as Senior Manager – Sales for ING Investments Pvt. Ltd.

### SAGAR PANDYA

Sagar has a total of 8 years of experience training experience in the areas of Credit Risk, Credit Rating & Credit Analysis. He has imparted training on Banking, Insurance, Broker dealer and other NBFIs, as well as in the FMCG domain along with Corporate Reporting. Sagar has worked for companies such as Citibank, Dun & Bradstreet, Crisil Ltd, Oracle Financial Services Ltd, Future Group and he has an MBA in Finance from N. L. Dalmia Institute of Management Studies and Research.

### NEHA IDNANY

Neha has over 9 years of experience in investment analysis and portfolio management services, having worked for organizations such as Angel Broking and Malabar Investment Advisors. She is an Investment Analyst and her domain of expertise lies in value-driven bottom-up stock picking based on fundamental analysis. Neha is an Electronics Engineer from Thadomal Shahani Engineering College, Mumbai and holds a Post Graduate Diploma from Indian School of Business (ISB), Hyderabad

## PLACEMENT ASSURANCE



### RESUME BUILDING

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



### INTERVIEW PREP

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



### MOCK INTERVIEWS

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



### INTERVIEW OPPORTUNITIES

We provide upto 3 interview opportunities post successful completion of the course

## ROLE OF MOTILAL OSWAL AMC AS KNOWLEDGE PARTNER

Motilal Oswal AMC is closely involved in the design and delivery of the Prodegree.



### SHARING REAL-WORLD CASE STUDIES



### GUEST LECTURES & MENTORSHIP



### INDUSTRY-APPROVED CURRICULUM

## CONTACT US FOR A PROFILE REVIEW

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