NSE Academy

CAWA

International Certificate Partner

DEAKINCo. | DEAKIN UNIVERSITY

ADVANCED PROGRAM IN FINANCE & WEALTH MANAGEMENT

SYLLABUS

Duration
3 months

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MODULES

Month 1

- **Introduction to Savings & Investment**
  - Savings, Investment & Speculation
  - How to convert savings into investment for long-term wealth creation
- **The Power of Compounding**
  - Its impact on investments and wealth creation
- **How Macros impact the Markets**
  - Economic Growth
  - Inflation
  - Policy Actions
- **Where to Invest? Let's talk about Asset classes**
  - Equity as an asset class
  - Debt as an asset class
- **Importance of Asset Allocation**
  - Practical nuances of asset allocation
- **Investing through Mutual Funds**
  - Types of Mutual Fund
  - Use of MF as an investment tool
  - How to select a Mutual Fund
- **Creating your MF investment portfolio**
  - Selection of debt and equity schemes
  - Monitoring the portfolio
  - How to evaluate the performance of a portfolio
  - How to calculate investment returns

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MODULES

Month 2

- **How to value a Bond**
  - The practical approach
- **How to value an Equity share?**
  - Using bottom-up and top-down methodology
- **Diversification and Portfolio Risk** *Digital Badge - NSE Knowledge Hub* *Self-paced*
  - Explain what is diversification of portfolio
  - Explain portfolio risk
- **Strategies to minimise portfolio risk**
  - Strategies for debt investments
  - Strategies for equity investments
- **Can gold and real estate have a place in an investor's portfolio?**
  - Ways to take exposure in gold
  - Ways to take exposure in real estate
- **Insurance and Wealth Protection**
  - Life Insurance
  - Health Insurance
  - Vehicle Insurance
  - Home Insurance
- **A comprehensive portfolio**
  - Constructing a comprehensive portfolio
  - Tracking a portfolio
  - Evaluating performance of a portfolio
  - Rebalancing a portfolio

MODULES

Month 3

- **Financial Planning** *NSE Knowledge Hub* *Self-paced*
  - Risk Profiling
  - Model Portfolio
  - Portfolio maintenance & rebalancing
  - Risk-adjusted return
  - Performance attribution
- **Estate Planning**
  - Inter-generational wealth management
- **How to Acquire and Manage a Client?**
  - Client Connect Protocol
  - Client Retention Strategy
- **Effective Communication in the workplace** *Certified by DeakinCo* *Self-paced*
  - Professional communication
  - Persuasive communication
  - Interpersonal communication
- **Acing Job Interviews**
  - Key traits needed to start a career as a financial advisor
- **Career options as a Financial Advisor**
  - As an Employee
  - As an Entrepreneur
- **Handling Client meetings**
  - **The practical approach**

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MEET THE FACULTY

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ADIA-UAE,SP JainGlobal

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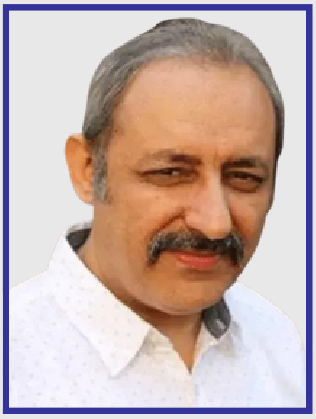

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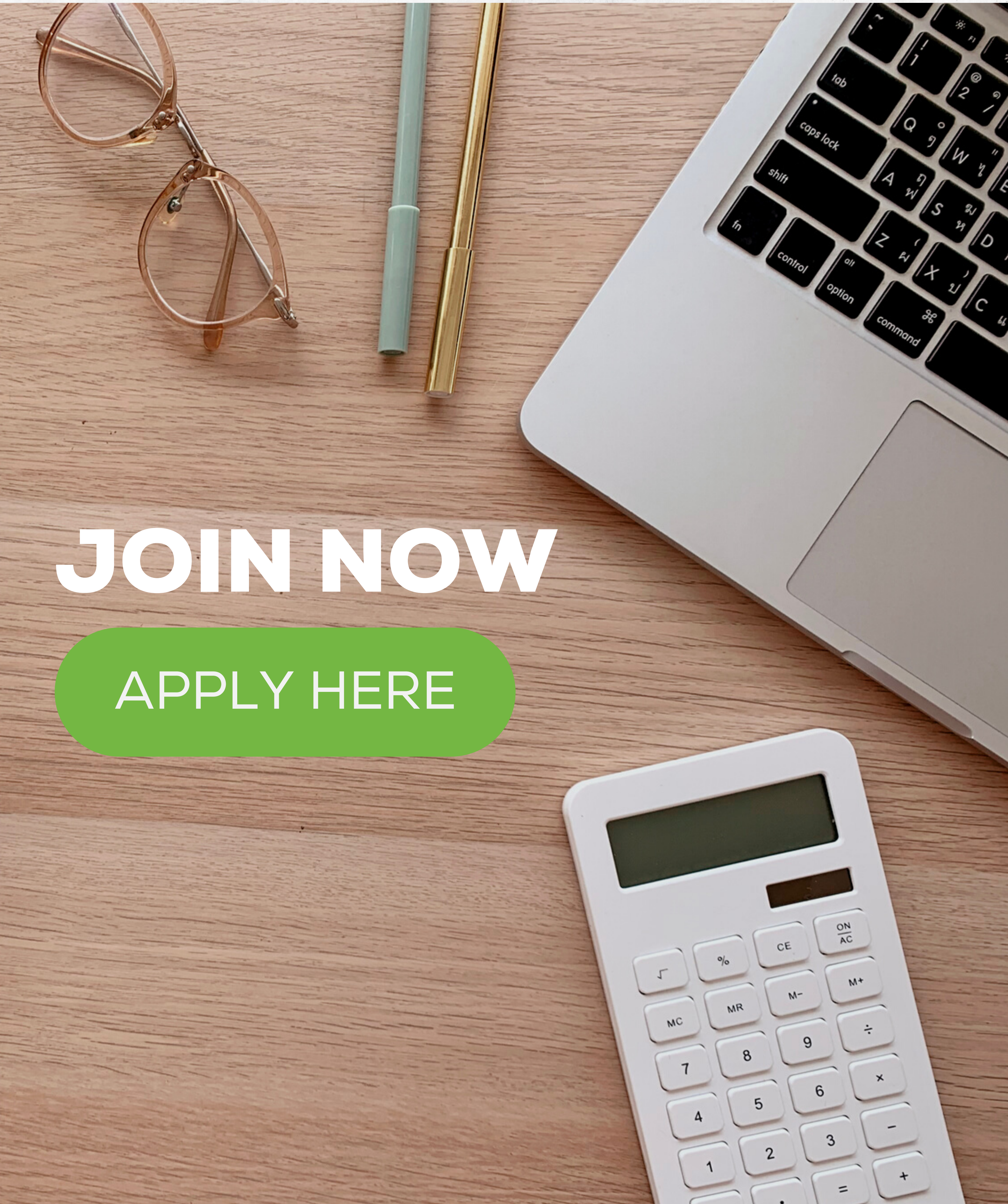

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