



***Certified Program in
Finance & Wealth
Management***

EXPERT



Unlock the Secrets to Financial Success!

? Are you a working professional seeking to enhance your financial knowledge and secure your future?

? Are you an investment professional looking to sharpen your skills and stay ahead in the dynamic world of finance?

Look no further! The Certificate Program in Finance & Wealth Management is designed just for you.



Program Overview

Duration	40 hours (self-paced) + 3 live classes
Learning Mode	Hybrid program for flexible learning
Who is it for?	Working professionals and investment enthusiasts.

Join the Certificate Program in Finance & Wealth Management and take control of your financial future! Whether you're a seasoned investor or just starting your financial journey, this program will equip you with the knowledge and skills needed to make informed financial decisions.



Program Modules

Module 1: Foundations of Financial Success

- Understand the basics of savings, investment, and speculation.
 - Learn how to convert savings into long-term wealth.
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Module 2: The Magic of Compounding

- Discover the profound impact of compounding on investments and wealth creation.
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Module 3: Macroeconomics and Market Dynamics

- Explore the influence of economic growth, inflation, and policy actions on financial markets.
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Module 4: Asset Classes

- Delve into asset classes, including equity and debt.
 - Understand the characteristics of equity as an asset class.
 - Explore the nuances of debt as an asset class.
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Module 5: Asset Allocation Strategies

- Master the art of practical asset allocation.



Program Modules

Module 6: Precious Metals and Real Estate Investments

- Evaluate the role of gold and real estate in a well-rounded investment strategy.
- Explore various ways to invest in these asset classes.

Module 7: Insurance for Wealth Protection

- Understand how life, health, vehicle, and home insurance contribute to comprehensive wealth protection.

Module 8: Mutual Funds Demystified

- Explore types of mutual funds and their utility as investment tools.
- Learn to select the right mutual funds for your portfolio.

Module 9: Crafting Your Mutual Fund Portfolio

- Build and manage a diversified mutual fund portfolio.
- Select debt and equity schemes, monitor your investments, and calculate returns.



Program Modules

Module 10: Bond Valuation Simplified

- Gain practical insights into valuing bonds and understanding their role in your portfolio.
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Module 11: Equity Evaluation Techniques

- Learn bottom-up and top-down methodologies for valuing equity shares.
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Module 12: Risk Management Strategies

- Develop strategies to minimise risk in your investment portfolio.
 - Explore risk management approaches for both debt and equity investments.
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Module 13: Crafting Your Comprehensive Portfolio

- Master the art of constructing, tracking, and evaluating a diversified portfolio.
- Learn the importance of rebalancing to maintain optimal performance.



Top 4 compelling benefits of the “Certificate Program in Finance & Wealth Management”:

I

Wealth Creation: Learn how to transform your savings into long-term wealth through effective investment strategies.

II

Asset Allocation Mastery: Optimize portfolio diversification to enhance returns while managing risk.

III

Mutual Fund Proficiency: Gain expertise in selecting and managing a diversified mutual fund portfolio.

IV

Financial Empowerment: Develop the knowledge and confidence to make informed financial decisions and secure your financial future.



Don't miss this opportunity to unlock the secrets to financial success!

Enroll now and embark on your path to financial empowerment.

Program Fees:

₹20,000/-

(inclusive of 18% GST)

ENROLL



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