



Add On Certification on Mutual Fund - NISM

L: 35 Hours

Objective	<p>The certification program in Mutual Fund creates a common minimum knowledge benchmark for all persons involved in selling and distributing mutual funds including:</p> <ul style="list-style-type: none">• Individual Mutual Fund Distributors• Employees of organizations engaged in sales and distribution of Mutual Funds• Employees of Asset Management Companies specially persons engaged in sales and distribution of Mutual Funds <p>The certification aims to enhance the quality of sales, distribution and related support services in the mutual fund industry.</p>
Date	29 th Jan to 9 th April 2021
Venue	Classroom
Organized by	Management Department
Resource Person	Mr. Chandresh Gupta from Nifty Ki Paathshala
Beneficiary	BBA II year
Expected Outcome	<p>On successful completion of the Mutual Fund Distributors examination, the candidate should:</p> <ul style="list-style-type: none">• Know the basics of mutual funds, their role and structure, different kinds of mutual fund schemes and their features• Understand how mutual funds are distributed in the market-place, how schemes are to be evaluated, and how suitable products and services can be recommended to investors and prospective investors in the market.



Mangalmai Institute of Management Technology
Greater Noida (U.P.)



	<ul style="list-style-type: none">• Get oriented to the legalities, accounting, valuation and taxation aspects underlying mutual funds and their distribution.• Get acquainted with financial planning as an approach to investing in mutual funds, as an aid for mutual fund distributors to develop long term relationships with their clients.
Evaluation	Students having attendance of 90% and above will be eligible to appear for the examination. Successful candidates shall be awarded with certificates.

Schedule

Session	Content	Time	Date
1	What is a Mutual Fund?	3 pm to 4 pm	29th Jan, 2021
2	History of Mutual Funds in India	3 pm to 4 pm	1st Feb, 2021
3	Role of SEBI in mutual funds industry	3 pm to 4 pm	3rd Feb, 2021
4	How is a mutual fund set up?	3 pm to 4 pm	5th Feb, 2021
5	Net Asset Value (NAV) of a	3 pm to 4 pm	8th Feb, 2021



Mangalmai Institute of Management Technology
Greater Noida (U.P.)



	scheme		
6	Different types of mutual fund schemes	3 pm to 4 pm	10th Feb, 2021
7	Open-ended Fund/ Scheme	3 pm to 4 pm	12th Feb, 2021
8	Close-ended Fund/ Scheme	3 pm to 4 pm	15th Feb, 2021
9	Growth / Equity Oriented Scheme	3 pm to 4 pm	17th Feb, 2021.
10	Income / Debt Oriented Scheme	3 pm to 4 pm	19th Feb, 2021
11	Balanced Fund	3 pm to 4 pm	22nd Feb, 2021
12	Money Market or Liquid Fund	3 pm to 4 pm	23rd Feb, 2021
13	Gilt Fund	3 pm to 4 pm	24th Feb, 2021
14	Index Funds	3 pm to 4 pm	25th Feb, 2021
15	Sector specific funds/schemes	3 pm to 4 pm	26th Feb, 2021



Mangalmai Institute of Management Technology
Greater Noida (U.P.)



16	Tax Saving Schemes	3 pm to 4 pm	3 rd March, 2021
17	Fund of Funds (FoF) scheme	3 pm to 4 pm	5 th March, 2021
18	Load or no-load Fund	3 pm to 4 pm	8 th March, 2021
19	Mutual fund impose fresh load or increase the load beyond the level mentioned in the offer documents	3 pm to 4 pm	10 th March, 2021
20	Sale or repurchase/redemption price	3 pm to 4 pm	12 th March, 2021
21.	Assured return scheme	3 pm to 4 pm	15 th March, 2021
21.	Invest in a scheme of a mutual fund	3 pm to 4 pm	17 th March, 2021



22.	Transfer of units after purchase from stock markets in case of close-ended schemes	3 pm to 4 pm	19 th March, 2021
23.	Can a mutual fund change the nature of the scheme from the one specified in the offer document	3 pm to 4 pm	22 nd March, 2021
24.	Performance of a mutual fund scheme	3 pm to 4 pm	23 rd March 2021



25.	To know where the mutual fund scheme has invested money mobilized from the investors.	3 pm to 4 pm	24 th March, 2021
26.	Difference between investing in a mutual fund and in an initial public offering (IPO) of a company.	3 pm to 4 pm	26 th March, 2021
27	If schemes in the same category of different mutual funds are available, should one choose a scheme with lower NAV.	3 pm to 4 pm	31 st March, 2021



28.	Choose a scheme for investment from a number of schemes available. Companies having names like mutual benefit the same as mutual funds schemes	3 pm to 5 pm	2 nd Apr, 2021
29.	Higher net worth of the sponsor is a guarantee for better returns. Can an investor appoint a nominee for his investment in units of a mutual fund.	3 pm to 5 pm	5 th Apr, 2021
30.	Segments: Equity Markets, Debt Markets, banking Treasury, Currency and Currency Derivative Markets, Commodity Derivative Markets, retail banking. Research: Equities, Debt Markets, Currency Markets, Commodity Markets.	3 pm to 5 pm	7 th Apr, 2021



Mangalmay Institute of Management Technology
Greater Noida (U.P.)



31.	Analytics: Credit Research & Ratings, Economic Research, Policy Research, Advanced Analytics and Computing in Risk Management & Derivatives, Front-, Mid- and Back-Office Analytics, Legal Research & Analysis, Mutual Fund Analytics, News and Media, Fintech. Broking and Dealing: Equities, Equity Derivatives (F&O), Debt (G Sec, Corporate Bonds, Securitized Debt and Structured Finance, Municipal Bonds), Syndicated Debt, Mutual Fund Distribution,	3 pm to 5 pm	9 th Apr, 2021
-----	--	--------------	---------------------------



Outcome of Add on program	After completing the add on program in French language students are able to demonstrate proficiency in spoken and written French. They are able to demonstrate the ability to read critically, interpret analytically, speak persuasively, and write coherently about visual and literary texts produced in the French-speaking world. They are able to demonstrate familiarity with methodological approaches in the study of literary and cultural texts, such as close reading, socio-historical contextualization, and literary and cultural theory. They are able to demonstrate knowledge of literary and cultural traditions, such as major movements, writers, and works of the French-speaking world, focusing on at least one and ideally multiple traditions.
Beneficiary	06 students of BBA-II Year

Report

Certification on Mutual Fund –NISM was organized by MIMT for BBA-II year students. After completing this add on program, students are able to know the basics of mutual funds, their role and structure, different kinds of mutual fund schemes and their features, understand how mutual funds are distributed in the market-place, how schemes are to be evaluated, and how suitable products and services can be recommended to investors and prospective investors in the market. They get acquainted with financial planning as an approach to investing in mutual funds, as an aid for mutual fund distributors to develop long term relationships with their clients. Total 6 students registered and passed the exams,