eTouchstone

The Next Level of Education

"Empower students to emerge as efficient money managers through imparting practical knowledge in financial markets; thereby enabling better employment opportunities & nurturing entrepreneurship skills"

CERTIFICATION PROGRAM IN INVESTMENT MANAGEMENT

COURSE BROCHURE

eTouchstone
The Next Level of Education

TRAINING MODULES

Module 1	Module 2
Basics of Investing	Equities: Primary Markets

Module 3	Module 4
Equities: Secondary Markets	Derivatives: Futures & Options

Module 5	Module 6
Fundamental & Technical Analysis	Mutual Funds

Module 7	Module 8
Insurance: Life & General	Asset Allocation & Wealth Management

The program is designed as per the latest industry trends and is a well packaged blend of subject matter training, live trading environment, case studies, skills training, simulations and assessments.
Training is imparted by a strong team of experienced faculty who have significant industry experience and a passion to teach.

FACULTY

eTouchstone
The Next Level of Education

Mr. Balaji Rao | Chief Trainer & Mentor
With more than 23 years of industry experience across business verticals, Balaji Rao is an expert trainer & guide on multiple subjects pertaining to financial management. His vast experience and knowledge gathered from a rich professional career gives him a cutting edge in identifying areas for improvement, providing sound investment guidance and helping aspiring candidates turn into successful investment professionals.

Mr. Srinivasa Giri | Associate Trainer
With 18 years of industry experience across Financial Services, Pharma & FMCG sectors, Srinivasa Giri has been associated with leading organizations in critical roles. His in-depth knowledge on investment techniques & derivatives make him an expert guide in understanding the intricacies of technical analysis & hedging. Apart from imparting training on these subjects, he visits many management colleges as a guest lecturer on technical analysis and derivatives.

Mr. Prasad Achaiah | Associate Trainer
Prasad Achaiah has a rich and diverse experience in the Insurance industry across various verticals. He has an in-depth understanding of products, business development & marketing strategies in the insurance domain. He is a guest lecturer in various academic & management colleges as an expert on the subject of insurance & is an independent investment consultant.

eTouchstone
The Next Level of Education

ABOUT US

eTouchstone is the Intellectual Consulting & Training division of Touchstone Corporate Services Private Limited, a company that was incorporated to provide 'Corporate Services' solutions in various spheres of an organisation's functioning.

eTouchstone, through the CPIM module aims to provide high quality professional education & training in academic institutions & corporate houses into areas of Wealth Management, Personal Finance & Financial Planning which would empower individuals emerge as better money managers both in their personal as well as their professional life. The program is a 'must have' for anyone who wants to pursue a career in wealth management or would like to take well informed investment decisions in handling their own wealth.

Clientele List

Touchstone's clientele list includes well established & widely known names like:
Bajaj Allianz Life Insurance, Citibank, Fidelity MF, FPSB India Board, HDFC MF, IDFC MF, iFast Financial, Kotak Mahindra MF, Morgan Stanley MF, Reliance MF, Religare MF, SBI MF, SMC Sanlam Wealth Management, Sprism Investment Services, UTI MF & many more..

Touchstone Corporate Services Private Limited
www.touchstonecorp.in | www.etouchstone.in | +91 80 2346 8885