



eTouchstone
The Next Level of Education

Certification Program in Investment Management
(CPIM)

June 2010

CPIM The Course

MODULE – 1: *BASICS OF INVESTING*

Module Duration: 1 Hour

» Evolution of Investment Practices

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CPIM The Course

MODULE – 2: *EQUITIES – PRIMARY MARKET CONCEPTS*

Module Duration: 4 Hours

- » Definition of Equity & Methods of acquiring equity
- » Meaning of Public Issue
- » Basic terms used in primary markets
- » Case study on how a company plans to tap primary market
- » Role of Intermediaries (Venture Capital Companies, Private Equity Investors, Merchant Bankers, Underwriters, Bankers, Compliance Officers & Syndicate Members)
- » Pricing of an Issue
- » Investor categorization
- » Bidding process, Price Band, filling application forms & using options in them, bid revision procedures
- » Basis of Allotment – oversubscription, under-subscription and fully subscribed
- » Advantages of being a shareholder

Practicals: *Live Offer Document/Red Herring Prospectus study, IPO application form study*



CPIM The Course

MODULE – 3: *EQUITIES - SECONDARY MARKET CONCEPTS*

Module Duration: 4 Hours

- » Meaning of Secondary Markets and its purpose
- » Role of Stock Exchanges, Demat & Remat procedures, Role of Stock Brokers
- » Defining stock markets & learning various market terminologies
- » Index Indicators, BSE/NSE Index List, Importance of Index
- » Definition of Market Capitalization & various Market Caps with examples
- » Equity as an asset class
- » Objectives of investment
- » Managing Trading & Investment Portfolios
- » Capital gains/losses related learning, workings, calculations, rules, tax slabs
- » **Practicals: *Learning through live NSE trading terminal in the classroom; Understanding market dynamics in a live environment***



CPIM The Course

MODULE – 4: DERIVATIVES (Futures & Options)

Module Duration: 9 Hours

- » Introduction to derivatives markets
- » Types of Futures Instruments
- » Important Terms in Futures
- » Futures Market's Important Mechanisms
- » Learning Options
- » Various Hedging Mechanisms

Practicals: *Learning through live NSE trading terminal in the classroom; Understanding various mechanisms in a live environment*

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CPIM The Course

MODULE – 5: FUNDAMENTAL & TECHNICAL ANALYSIS

Module Duration: 6 Hours

- » Introduction to Fundamental Analysis
- » Important factors of fundamental analysis
- » Introduction to Technical Analysis
- » Important indicators and interpretations (Open, High, Low, Close & Volume related indicators)

Practicals: *Learning through live research reports, charts & annexure for easy understanding of both concepts*



CPIM The Course

MODULE – 6: MUTUAL FUNDS

Module Duration: 6 Hours

- » Features
- » Specifics of NAV
- » How does a mutual fund work & fund management basics
- » Definition of Growth Option, Dividend Payout & Reinvestment Options with sample workings & formulas
- » Debt schemes – defining various debt instruments and understanding risk
- » Equity schemes – defining various equity instruments, types, definition, risk, taxation and type of investors
- » Capital Gains/Losses definition, calculations and examples
- » SIP/STP Learning, Low/High NAV Myths
- » Chart & sample working

Practicals: *Studying Fund Fact Sheets, Fund Manager Interviews, Historical real-time data of mutual fund schemes, templates & formulae*



CPIM The Course

MODULE – 7: INSURANCE - LIFE & GENERAL INSURANCE CONCEPTS

Module Duration: 6 Hours

- » Life insurance concepts
- » Principles of Insurance, Insurable Interest, Important Insurance Products, Definition with examples
- » How to pick the right insurance product
- » General insurance concepts
- » Definition of important general insurance products
- » Importance of health insurance with examples
- » Tax benefits

Practicals: *Studying model simulations of insurance selling, fear-factor, insurance as a hedge against death or financial losses through live case studies*



CPIM The Course

MODULE – 8: ASSET ALLOCATION, WEALTH MANAGEMENT & FINANCIAL PLANNING CONCEPTS

Module Duration: 12 Hours

- » Definition and purpose of asset allocation
- » Significance of Asset Allocation in present times
- » Asset allocation charts – explained through 5 indicative scenarios
- » Components of wealth management & Financial Planning
- » Steps involved in investment planning
- » Customer Management
- » Designing & Structuring Stocks & Mutual Fund Portfolios

Practicals: *Asset Allocation simulations, Templates & Easy Formulae, Case Studies, Model Workings, Simulations*

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End of Presentation

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