## Theory Content

Hours

#### Module No. 1: Foundations for Finance

Introduction to Basic Concepts: Understand the need for financial planning – basic concepts – life goals and financial goals – format of a sample financial plan for a young adult Economics: Meaning – scope – key concepts influencing decision making both micro & macro Banking in India: Types of Bank Deposits, Deposit Insurance (PMJDY). Traditional and New Banking Models. Debit and Credit Cards. Digital Payment System – Internet Banking (NEFT, RTGS and IMPS), Mobile Banking, Mobile Wallet, AEPS, UPI Orientation to Financial Statements: financial terms and concepts, model for reading financial statements, basic ratios for evaluating companies while investing – Time Value of Money – Concept of Compounding and Discounting

## Module No. 2: Investment Management

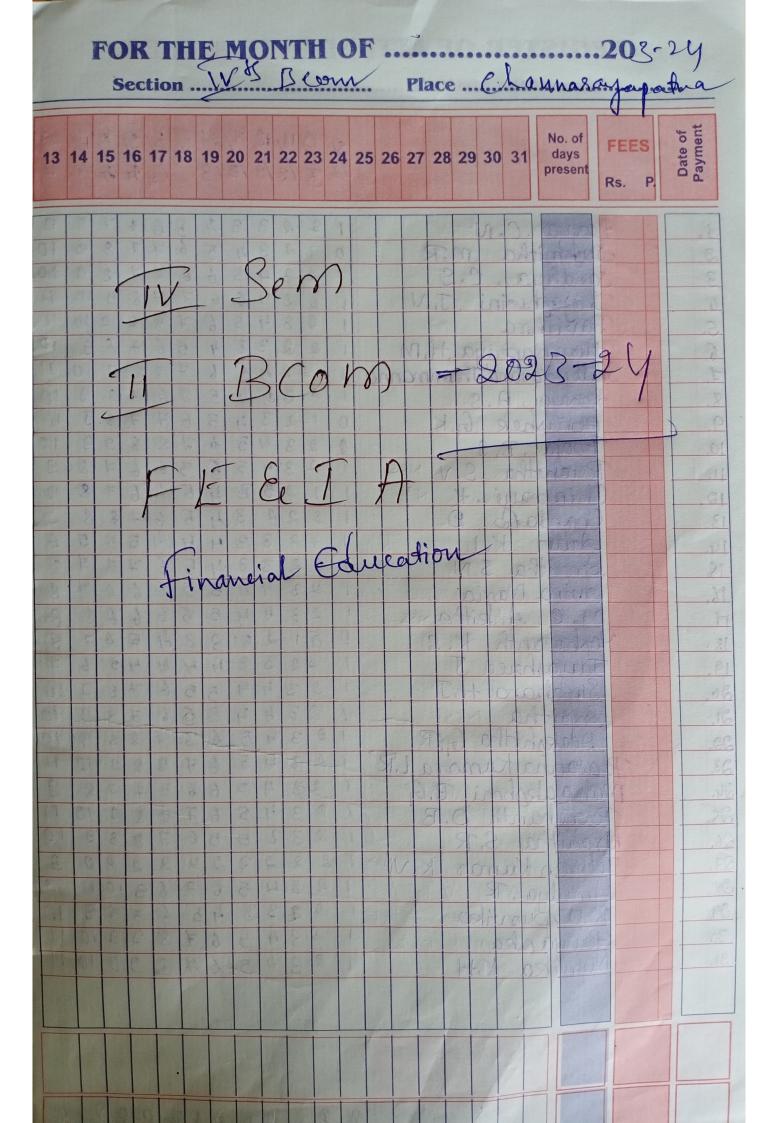
Investment Goals: Basic investment objectives – Investment goals – time frame – assessing risk profile – concept of diversification – risk measurement tools Investment and Saving Alternatives for a Common Investor: Insurance – Health, Life and Other General Insurance (Vehicle Insurance, Property Insurance, etc), Retirement and Pension Plans – National Pension System, Atal Pension Yojana, PM-SYM Yojana, PMLVMY PMKMDY etc., Stocks, Bonds, Mutual Funds. Investor Protection and Grievance Redressal Stock Markets: Primary Market and Secondary Market, Stock Exchanges, Stock Exchange Operations – Trading and Settlement, Demat Account, Depository and Depository Participants. Stock Selection: Fundamental Analysis – Economy Analysis, Industry Analysis and Company Analysis. Technical Analysis – Graphical Patterns, Candle-stick Patterns, Indicators and Oscillators Stock Return and Risk: Analysing risk and returns trade off1 relationship-investment risk

# Module No. 3: Mutual Funds and Financial Planning Essentials

Mutual Funds: Features of Mutual Funds, Mutual Fund History in India, Major Fund Houses in India and Mutual Fund Schemes. Types of Mutual Fund Plans. Net Asset Value. Criteria for selection of Mutual Funds: Returns, Performance Measures – Sharpe, Treynor, Alpha, Beta and r2 Financial Planning: Sample formats – Integrating all the concepts learnt with a personal financial plan Giving and supporting: Family support – charitable giving – crowd sourcing for needs

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#### REGISTER OF ATTENDANCE & FEES FOR THE MONTH OF ......20 Name of the Institute ..... Admi ssion No. 91, 18 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 NAMES days presen Kavya .C.N Syprmitha .M:R Sandhya .C.S Thejaphwini .J.N Pavithra 67 1 2 2 3 3 4 5 1 2 3 4 5 6 7 8 9 10 11 13 13 14 15 16 17 1019 1 2 3 4 5 6 7 7 2 3 4 5 6 7 7 2 3 7 8 0 9 10 4 11 13 13 14 15 16 17 1019 19 4 11 10 13 14 15 16 16 10110 20 7 8 3 4 5 6 7 9 10 15 12 13 14 15 15 16 17 18 IOTA 19 3 4 5 6 7 1 8 8 9 10 11 18 18 18 18 16 17 18 10+9 4 2 2 3 8 5 6 Hamsapriya H.M Shelly Kavane Thammanna 7 8 1 10 11 11 12 13 13 14 15 16 1019 19 345 6 7 8 1 10 11 19 13 14 16 16 17 18 18 1019 19 5 5 Kanya. A.S Abhizhek G.K 6 8 9 10 11 12 13 14 14 17 18 19 10+9 19 23456 11 19 13 14 15 18 17 10 1049 19 Pooja .B.S Ruchitha .S.V NSS 8 10, 9 11 12 13 14 14 15 15 10 20 3 4 5 6 5 6 9 8 4 5 6 # 11. 10 10 11 11 12 11 11 1049 Chinneyi. K HSS 7 8 12 6 10 10 12 13 13 13 13 13 19 10+9 2 3 4 5 Chardana D 1 Q 2 8 す 2 10 11 12 13 14 15 16 17 13, 9 19 1049 3 3 4 4 4 4 3 3 4 5 6 4 4 5 6 6 2 2 3 3 4 D Asun K.L 1 5 5 5 7 8 9 10 10 11 12 13 6 14. 10+6 16 7 4 2 ¥ 15. Anvitha S.N 10 11 11 12 13 14 8 10+9 234 6 16. Avira Maria 1 6 8 9 9 10 10 11 12 13 19 0+9 M. C. Ankitha NSS 2344 10+9 П. 6 10 11 12 12 12 13 13 19 0 Yaphusanth K.S. 9 10 13 12 12 13 14 15 10+8 18 18 2233444 5 Jayashree J Sinchana H.J 8 8 9 10 10 11 12 12 19. 10+10 20 234455 6 78 9 12 13 14 14 15 16 17 20 10 1019 19 23456 23456 Aspitha Mss Deekshitha G.R 13 1314 14 14 14 14 5 5 21. 1 6 78 9 10 19 11 12 18 13 14 15 16 20 10 10+9 19 34. 34. 7 Brasanna Kumara L.R. 11 18 13 14 15 15 15 15 1 8 9 10 8 1019 Mahalakohmi B.G. Prasahanth D.B 23 4 5 10 10 11 18 12 13 14 15 6 6 7 7 8 1019 12 0 12 13 13 13 14 15 15 3 4 6 9 10 () 18 10+8 8 11 18 13 13 14 15 16 19 2 10 Q6. Q1, Arphitha S.R 3 3 4 10 8 9 10+9 Jelvan Kumara K. V+>> 2 2 1 2 2 2 2 2 3 456 6 6 16 2 1016 2 Amulya. R K.U punzika Poziyanka Menika KH 9 10 7 8 9 9 141516 17 18 Lotio 28 Q 3 4 5 6 7 12 20 11 20 8 233456 45 2 2 6 29. 9 10 F 12 13 13 14 15 19 10+9 19 12 3 13 14 15 16 17 18 30 10 11 10+9 12 13 14 15 15 16 17 18 19 2345678991011 10+9 31. Number Present M Daily E Initials M 22 P 19

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