

College of Insurance
Insurance Institute of India, Mumbai
Classroom Training Session on Investment Management in
Insurance Companies ID – CPC6
(From: 24th to 25th May, 2023)

Background:-

Insurance companies hold huge amounts of policy reserves that arise from premiums collected from policy holders. These amounts are invested in various kinds of assets and the earnings of these investments are a primary source of surplus, which gets distributed as policy holders' surplus and owners' dividends. Investment Operations is one of the principal functions that insurance companies need to conduct and monitor carefully as it is a critical source of life insurers' earnings. Insurers differ from other financial institutions like banks in one respect – their principal concern is with liability rather than asset side risk. This imposes a number of specific considerations and constraints that have to be taken into account when framing policies and conducting their investment operations. In particular, they need to take cognizance and abide by various norms that are imposed on investment by the regulatory authorities like IRDAI. They also need to have a sound understanding of the economy and conditions of the Capital markets and the opportunities and challenges they present.

This program has been designed with a view to enable a deeper understanding and appreciation of the Investment function of Insurance companies, including the nuances involved. The participants would be able to get a holistic view of the linkages between investment and areas like actuarial and financial management as well as insights on how to make investment operations more effective and efficient in given circumstances.

Learning Objectives:-

- ❖ Insurance Investments – basic distinctions : contractual and contingent nature of insurers' liabilities and their need to manage capital value and income risks; Canons of Investment; matching and immunisation and other perspectives [from actuarial literature]; efficient portfolio management in the presence of liabilities ; Investment and Asset Liability Management
- ❖ Regulations relating to Capital Markets – the norms and their implications : a comprehensive review
- ❖ Investment Options : a review of market conditions with respect to various kinds of securities like Bonds, Debentures, Equities, Money market instruments, etc.,
- ❖ Investment Management functions : Investment policy, Operations, Monitoring and Accounting

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Program Contents:-

- ❖ Portfolio Management
- ❖ Concept of Asset Allocation
- ❖ Various types of Financial Instruments
- ❖ Fundamental and Technical Appraisal
- ❖ Monitoring – Various Corporate actions
- ❖ Accounting – Valuation of Investments

Participant's Profile:-

Investment managers at junior and middle level working in Investment department/other departments, who may need to know about investment operations in insurance companies.

Course Coordinator:-

Mr Krishnamohan Y – 022-26544209 Email: ykmohan@iii.org.in

Program Duration & Timing: -

2 days & from 10.00 a.m. to 05.00 p.m.

Course Fees:-

- **Participants requiring residential facilities: Total amount Required –Rs. 11800/- i.e. (Rs. 10000/- plus 9% CGST + 9% SGST).**

The fees cover tuition, course material, A/C single room accommodation in the Institute's campus and full boarding (bed tea/coffee, breakfast, lunch, light refreshments in the evening and dinner). All rooms are fully furnished with attached bathroom and Internet facility.

Rooms are reserved from 12.00 noon onwards the day prior to the commencement of the program. The participants can stay till 12.00 noon next day after the conclusion of the program.

- **Non-residential participants: Total amount Required –Rs. 8496/- i.e. (Rs. 7200/- plus 9% CGST + 9% SGST).**

The fees cover tuition, course material and day boarding (i.e. tea/coffee during tea breaks and lunch for actual days of training).

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Payment Terms and Conditions:-

- 1) The payment should be received by the College of Insurance before the commencement of the program.
- 2) The confirmation of registration for the program will be subject to receipt of payment.
- 3) Please see below details for Bank Transfer.

Name of the Beneficiary	Insurance Institute of India
Account No.	004010100143462
IFS Code	UTIB0000004
MICR Code	400211002
Swift Code	AXISINBB004
Name of Bank	Axis Bank Ltd
Address	Fort Branch, Universal Insurance Building, Ground Floor, Sir P M Road, Fort, Mumbai – 400001.

- 4) For online payment mode by following the below link

https://www.coi.org.in/COI_WebPortal/cmc/regDetails.htm?eventid=1676

Training Venue:-

Please follow below link / QR Code for Training Venue

<https://rgo.page.link/qs2Qb>



Parking Facility:-

Public parking available at 5 minutes walking distance (Behind US Consulate).

Respond to:-

Ms. M M Satam	college_insurance@iii.org.in	022-26544324
Ms S S Vaidya		022-26544266
Ms A P Dalvi		022-26544254
Mr P M Tare		022-26544251
Ms N B Bagde		022-26544234

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Nomination Form

- 1) Name: _____
- 2) Address: _____

- 3) Educational Qualification: _____
- 4) Date of Birth: _____
- 5) Position Held.: _____
- 6) Mobile No : _____
- 7) Telephone No. : _____
- 8) E-Mail: _____
- 9) Alternate E-Mail: _____
- 10) Sponsoring Organisation: _____

Please affix
your
photograph
here

11) Food preference: ☐ Vegetarian ☐ Non-Vegetarian

12) Accommodation Required: ☐ Yes ☐ No

13) Details of Fee Paid: Cheque / D.D. No. _____ dt. _____
Drawn on _____ Bank, for Rs. _____

Signature & seal of the authority
of the Sponsoring organisation

Signature of the Participant

*Name of Co-ordinator: _____

Mobile No: _____ Tel. No.: _____

Email-Id.: _____ Company Name: _____

***This column is mandatory for those participants who are sponsored by company.**