

College of Insurance
Insurance Institute of India, Mumbai
Classroom Training Session on Understanding Bond Markets for
Insurance Investments, Program ID – CPC22
(From: 22nd – 23rd January 2024)

Relevance of the Program:-

Insurance Companies have substantial and recurring cash inflows from insurance premiums, net of claims. They also earn dividends and sale proceeds of equity investments, and coupon investment and maturity cash flows from its bond portfolio. The investment norms of Insurance Companies are guided by the statutes such as the Insurance Act, 1938 and the IRDAI Regulations on Investment issued and as applicable from time to time. The Investment Portfolio of Insurance Companies be it Life, General or Reinsurance consists substantially of Bonds, predominantly G-Sec, as well as SDL and Corporate Bonds. The investment style in bonds has been Hold-to-Maturity (HTM).

Program Objectives:-

- To update the conceptual knowledge and skills of the diverse participants to a desired base level in Bond and Debt Markets
- To demonstrate the linkage between concepts and application with skill-based exercises and cases
- To familiarize the participants with investment and trading strategies in bonds
- Learning Outcomes: at the end of this programme, the participants will be able to:
- To spot anomalies between intrinsic values and prices
- To read and analyse trends in yields based on macroeconomic events and utilize Bloomberg and other news feeds
- To identify opportunities to engage in contrarian trades on the sell and buy side

Program Contents:-

- Topics relating Bond Markets and Bond trading – Bond trading strategies.
- Sessions will be conducted in interactive mode, aided by presentation material, practical examples.

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Participant's Profile:-

Executives and officers working in Investment Departments of Insurance Companies and the officers responsible for managing Pension and PF funds and also the executives managing the Investment portfolios in Societies, etc.,

Course Coordinator:-

Dr Sanjay Tupe – 022-69654203 Email: tupe@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).

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.

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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.insuranceinstituteofindia.com/o/COI_WebPortal/cmc/eventDetails?eventid=1937

Training Venue:-

Please follow below link / QR Code for Training Venue

<https://qr.go.page.link/qs2Qb>



Parking Facility:-

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

Respond to:-

Mr. Vivek Rane	college_insurance@iii.org.in	022-69654284
Ms. Nilambari Bagde		022-69654234
Ms. Snehal Vartak		022-69654251
Ms. Vrushali Nagawekar		022-69654266
Ms. Jayashree Salian		022-69654249
Ms. Sneha Pednekar		022-69654270
Ms. Mrunal Satam		022-69654216

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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.