Insurance Institute of India, College of Insurance, Kolkata

Virtual Training Session on Financial & Investment Management in Life Offices (CVT) - 20 February, 2026

Program Concept and Objectives:

Financial and Investment Management 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 and which generate surplus which gets distributed to policyholders and dividend to shareholders. 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.

COI has created '***Virtual Training (CVT)'*** Rooms as a cost- effective mechanism for participants to equip participants academically at their respective location.

Key Takeaways of the program: The participants of the program would gain the knowledge and insight into the following:

- Financial Management of Life Office, Budgeting and Budget Control
- 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 Investments of Insurers, 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, Portfolio Management, Asset allocation, Technical Appraisal, Accounting-Valuation of Investments.

Participant 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.

Program Fees: ₹ 3540/-(₹ 3000/- plus 18% GST).

Program Coordinator: Mr. Subrata Ghoshal, Faculty, Email ID: **ghoshal@iii.org.in**, Contact No: 8697265355.

REGISTER NOW

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Program Date & Duration:

20 February 2026, 1 day (CVT)

Program Time (IST):

10.30 AM to 05.30 PM (6 Hrs.)

Program ID: CPL