

Virtual Training Session on Investment Awareness

Program ID – CPL15 (on 08th June 2023)

In personal financial planning and an executive working in Marketing side and other investment areas needs awareness regarding Financial Markets and Financial Instruments. This will enable understand how to management of his portfolio and effective asset allocation.

Financial literacy and knowledge in Investments Management- a combination of awareness, knowledge and skill is necessary to understand the financial implications of a financial decision. And ultimately achieve individual 'financial well-being' is increasingly being recognized as an essential life skill.

In the present context of digitalization and globalization the financial products are available in plenty, but their evaluation becomes complicates unless one has basic knowledge of about various Investment Avenues available their utility etc., Globally, the youth are becoming financial consumers early in their lives than ever before and making financial decisions (credit cards, education loans) that can have lasting consequences if not well managed. To connect with the millennials and other group of customers it has become mandatory for executives of financial institutions to have a clear understanding and knowledge of the financial world and its various dimensions.

COI has created '**Virtual Training (CVT) Rooms**' to conduct training program in a cost-effective manner for participants to equip themselves academically at their respective locations.

Programme Objectives:

- To have a overview of the Indian Financial Markets
- To understand various Investment Assets available
- To understand the Basic Principles of Investment.
- To learn the framework of personal financial planning.

Programme Contents:

- Various classes of Investment Assets
- Evaluation of the Various Investment Assets
- The Basic features of Investment
- Portfolio Creation
- Monitoring of Investments
- Valuation of Investment
- Return on investment
- Churning of Investments for higher return on the portfolio

Participant's Profile: Marketing personnel and other personal working in Insurance Companies and Broker Organizations. Also Individuals interested in having awareness in Investments.

Duration	Date	Time (IST)	Hours
One Day	08 th June 2023	10.00 hrs. - 13.00 hrs.	3 Hours / per Day

Course Fees: Rs.1770/- (Rs.1500/- + 9% CGST + 9% SGST)

How to enroll: [Click here for Registration](#) and for any help/queries please mail to college_insurance@iii.org.in

Certificate of Participation: Online Certificate in PDF format will be issued to all the participants.

Programme Coordinator:

Mr. Jayant Kumar, (Email id: vjayanth@iii.org.in Contact no. 022 - 26544285)

For enrolment and technical support call	Name	Contact No	Name	Contact No
	Ms. Snehal Vartak	022 - 26544251	Ms. Mrunal Satam	022 - 26544216
	Ms. Nilambari Bagde	022 - 26544234	Ms. Jayashree Salian	022 - 26544324
	Mr. Pravin Palav	022 - 26544254	Ms. Vrushali Nagawekar	022 - 26544266
	Mr. Vivek Rane	022 - 26544297		