



Insurance Institute of India, COI, Mumbai

Classroom Training Session on Investment Management in General Insurance Companies (CT) - 5 October, 2026

Participant Profile:

Managers at junior and middle levels working in the Investment department/ other departments who need to know about investment operations in insurance companies.

Program Date:

5 October 2026

Program Duration:

1 day (CT)

Program Time (IST):

10.00 am to 05.00 pm

Program Coordinator:

Mr. Shiva Kumar Singh,
Faculty, Email:
sk.singh@iii.org.in, Contact:
022-69654247

PROGRAM VENUE:

College of Insurance, Insurance
Institute of India, Plot No. C-46, G-
Block, Bandra-Kurla Complex,
Mumbai - 400 051.

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Program Concept and Objectives: Investment of funds is one of the principal functions of insurance companies. Insurers need to carefully monitor these funds as well, as these are critical sources of their earnings that get distributed as dividends to shareholders and can possibly keep the companies in a good financial position.

Insurers differ from other financial institutions like banks in one respect – their principal concern is with liability rather than with asset-side risk. This imposes a number of specific considerations and constraints that have to be taken into account when framing policies and conducting investment operations. In particular, they need to take cognizance of and abide by various investment norms prescribed by the regulatory authority. They also need to have a sound understanding of the economy, the condition 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.

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

- The Canons of Investment - efficient portfolio management and challenges related to Asset Liability Management
- Regulations relating to Investments of Insurers and Capital Markets, and their implications
- Investment Options - a review of market conditions with respect to various kinds of securities like Bonds, Debentures, Equities, Money market instruments, etc.,
- Insurance Investments - basic distinctions such as the contractual and contingent nature of insurers' liabilities and their need to manage capital value and income risks.
- Investment Management functions - Investment policy, Operations, Monitoring and Accounting
- Portfolio Management, Asset allocation, Technical Appraisal, Accounting-Valuation of Investments

Program Fees:

Non-residential participants: Total amount Required – Rs. 4720/- i.e. (Rs. 4000/- plus 9% CGST + 9% SGST).

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

PROGRAM TEAM:

Ms. Yogeeta Kulkarni	Any help/queries mail to college_insurance@iii.org.in	022-69654255
Ms. Rupali Thakur		022-69654284
Ms. Sakshi Pawar		022-69654251
Mr. A. G. Madwal		022-69654254
Mr. P. H. Ekke		022-69654234
Ms. Akshara Nagpal		022-69654266
Ms. Meghana Shrivastava		022-69654249
Ms. Sneha Pednekar		022-69654270
Ms. Mrunal Satam		022-69654216

Program ID : CPG

Website: www.insuranceinstituteofindia.com