

College of Insurance

Insurance Institute of India, Mumbai

Virtual Training Session on Equity Research and Valuation (CVT)(On: 7th October, 2024)

Program Concept and Objectives:

The resilience of insurance companies is a testimony to their financial soundness. To a large extent, the financial soundness is a function of a solid investment portfolio. The classic investing principles put forth by Andrew Bailey re: liquidity, safety and yield, continue to hold good and guide investment policy in the insurance sector. The Insurance Companies hold good amount of investment assets in equity portfolio. It is an advantageous proposition to provide exposure to its equity investment team on contemporary developments, approaches and techniques, so as to spot disparities between the discovered prices and intrinsic values of equities, in order to avail of buy/sell opportunities and also enable some churn to strengthen the portfolio in the long run.

Program Objectives are as follows:

- For an upskilling program for the team
- To provide an overall and fresh perspective towards stock selection
- To acquaint the team with the latest approaches and techniques in equity valuation
- To develop independent stock-selection skills and conduct independent buy-side research
- To critically evaluate research reports given out by sell-side analysts in stock-broking firms

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.

Key Takeaways from the Program:

At the end of program, you may take away with you the following things:

- Synthesize the learnings on stock selection in a systematic manner, within an Indian context
- Read and interpret government policy, latest developments in business and technology
- Understand DCF and EV/EBITDA approaches and their components, develop valuation frameworks based on contemporary knowledge and apply the same using EXCEL spreadsheets
- Understand the stock-picking methods followed by external analysts and stock-broking firms

Participant Profile:



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The executives and officers working in Investment department of an Insurance company and Portfolio Managers and Fund Managers.

Program Coordinator:

Mr. Subash Pattanayak

022-69654204

Email: pattanayak@iii.org.in

Program Duration & Timing:

1 day & from 10.00 a.m. to 05.00 p.m.

Program Fees:

The Program Fees: Rs.3540/- (Rs. 3000/- + 9% CGST + 9% SGST)

How to Enroll:

Please click the below link to register the program

https://www.insuranceinstituteofindia.com/o/COI_WebPortal/cmc/eventDetails?eventid=2220

Certificate of Participation:

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

Program Team:

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