

**Course Title:** *Foundation Programme in Banking & Financial Services*

**Course Objectives :** *to familiarize the students about basic banking and financial services.*

**Course Outcome:** *Students were able to make transactions in share markets*

**Number of hours :** *30 hrs.*

**Syllabus:**

### **Module 1**

Introduction on Entrepreneurship - Career trajectory & entrepreneurial opportunities in financial services - One crore activity – Basics of asset classes – Equity , Mutual funds , Bank savings ,Debt instruments ,Gold ,Real estate etc - Financial Freedom concept - Goal setting - asset allocation - Passive vs Active strategies - Financial markets – IPOs-Stock exchanges - Corporate actions – Dividend -Stock split -right issue -bonus issue -spin off etc with live examples -Normal account opening procedures, how to buy shares, IPO, FPO, Physical demat,etc

### **Module 2**

Banking and Insurance - Videos and Introduction to basic terminologies - Reinforce the points about building a business with Margin of Safety, and having a checklist to come out on top – Fundamental analysis – EIC analysis , Ratios , Valuation etc

### **Module 3**

Investment Strategies- "Systematic Investment Plan" - SIP calculator - Benefits of SIP, and the various processes involved- Overview of the various forms from various AMC, how to fill it, supporting documents etc. - Product Description - Equity & Debt MF - Terminologies - Process of selecting a MF from the universe and how it is analyzed to recommend a mutual fund. - Excel training for financial services operations.