

Programme on 'Pooled Investment Vehicles' from March 1-5,2021

Details of Programme on 'Pooled Investment Vehicles'

Programme Design:

1. One week full time programme

The teaching methodology includes class room teaching, case studies, quiz etc.

2.Course Contents are as follows:

1. Online Classroom Sessions

- a)Introduction to Financial Markets
- b)Overview and Evolution of Indian Securities Market.
- c)Macro economics linkage to savings and investments.
- d)Savings instruments - Government instruments (savings schemes, Fixed deposits) and Securities (transferable) - descriptions and characteristics.
- e)An Introduction to Collective Investment Schemes.
- f)Risk appetite and choice of savings vehicle
- g)Understanding Mutual Funds
 - i)*Investment Objectives and Strategies*
 - ii)*Types of Mutual Funds*
 - iii)*Investment Restrictions and Process of Mutual Funds*
 - iv)*Pricing and Valuation of Assets of Mutual Funds Schemes*
 - v)*Credit Evaluation and Risk Management Mechanism at Mutual Funds*
 - vi)*Regulatory Framework*
- h)Portfolio Management
- i)Understanding Alternative Investment Funds (AIFs)
 - i)*What are Alternative Investments?*
 - ii)*Types of Alternative Investments*
 - iii)*Role of Alternative Investments in Portfolio Diversification and Strategic Asset Allocation*
 - iv)*Difference between Alternative Investments and Traditional Investments*
 - v)*Characteristics of Alternative Investments*
 - vi)*Hedge fund strategies*
 - vii)*Overview of the AIFs industry in India as well as Globally*
 - viii)*Regulatory Framework*
- j)Introduction to Real Estate Investment Trust (REITs) and Infrastructure Investment Trust (InvITs)
 - i)*Structure of REITs and InvITs in India & Globally*
 - ii)*Risk & Return*

- iii)Regulatory Framework*
- iv)Functioning REITs/InvITs in other jurisdictions*
- v)Road Ahead – Issues, Challenges and Opportunities*

2. Practical Sessions/Simulation Lab

NISM Simulation lab provides the participants a unique learning experience about functioning of markets. The simulation lab is a state-of-art facility that promotes self learning through mock-trading sessions with daily market data in equity, derivative and commodity segments. The simulation exercises will be provided in the online mode.