

## **Rajagiri College of Social Sciences (Autonomous)**

### **Department of Commerce**

### **FINANCIAL SERVICES**

#### **About the course:**

As part of the skill development programme initiative accredited by KASE – Kerala Academy of Skills Excellence: Skill Development Team of Kerala Govt, Hedge School of Applied Economics conduct Value Added certification programme in “Financial Services”.

<b>Offered to</b>	BBA
<b>Offered during</b>	First semester
<b>Course Period</b>	December 3 <sup>rd</sup> 2018 to January 17 <sup>th</sup> 2019
<b>Total contact hours</b>	30 hours

#### **Objectives of the course:**

- To give an introduction to research analyst profile
- To give a brief idea about time mapping, accounting valuation and taxation of mutual funds
- To introduce pyramid and T shape games
- To give an overview on Indian Capital Market, Corporate actions and stock exchange
- To familiarise with investment patterns
- To familiarise : Pathshaala – Intraday trading game, Banking Game Role Play, Pyramid and T Shape Game

Date	Theme	Session Topic
July 2	Connecting the dots	Introduction video on entrepreneurship, Registration, 30 sec exercise, Teams to be assignee, stand ford address Steve Jobs.
July 3	Know Hedge	Company intro industry profile/ Career Trajectory in financial services/ front end and back end
July 4	Entering the ocean of reality in FS	Introduction to Research analyst profile/ role of mentors, beginners mind concept, daily reports/ email etiquettes, time mapping
July 5	Empty your tea cup	Basics of Asset classes, equity/debt/gold/MF/insurance
July 6	There is no such thing as one size fits all	Pyramid and T Shape Game/One crore activity
July 9	There is no such thing as one size fits all	Indian Capital Market/corporate actions/ Stock exchange - IPO/ Toro e Orseo/ Trading terminal
July 10	A public opinion poll is no substitute for thought	FA and TA Basics/How to do investment in Stocks
July 11		Pathshaala – Intraday trading game
July 12	A Jug fills drop by drop	SIP/World of MF/One Idiot Movie/Recommendation Lis
July 13		How to select MF/Liquid Funds/Lump sum
July 16		Terminologies/SIP Calculator – One Idiot Movie
July 17	Activity	Assigning equity and debt mf for preparing the presentation
July 18	Nuts & Bolts - The back end operations	fund structure/legal and regulatory framework/offer document/fund distribution and channel management
July 19		Accounting valuation and taxation of mutual funds/ investor service
July 20	Risk comes from not knowing what you are doing	Return and risk/ scheme selection/helping investors with financial planning
July 23		product selection/ model portfolio

July 24	Gateway to Financial Freedom	Financial Freedom - Goal Setting, asset allocation, passive and active strategies
July 25	The highest education is that which does not merely give us information but makes our life with harmony with all existence	Muster roll/Punching/top priorities for the day and top accomplishments of the previous day
July 26		understanding SMART/what/why/who/how/when/MIS
July 27	Activity	Product note preparation - GFF, SIP, Insurance, Ohari Ad
July 30	Arise, Awake, stop not till the goal is reached.	Equity operation, MF Operations, Ohari Operations – School Operations
July 31	The most important thing is to never stop questioning	how to read portfolio summary/ holding statements/ snippet
Aug 1	It's not the destination that matters, It is the journey	Process Vs Progress/ Family Tree concept/ Mind mapping/ Free Mind software/ Checklist/ Integrity(thoughts, speech, action)
Aug 2	Activity/ The Art of the Deal	Create your own family tree/ Sourcing/Tracker preparation, finalizing script, mock calls
Aug 3		email/telemarketing/direct marketing/digital marketing/ profiling(CPFS Profile Sheet) follow ups(persistence VS Pestering)cross selling, MIS
Aug 6	Arise, Awake, stop not till the goal is reached.	Assigning Companies for Research(Fundamental, Technical, Derivatives)/ Sector allocation/ Company Allocation
Aug 7	Activity	Game preparation - Allocation of different topics
Aug 8	It's not the destination that matters, It is the journey	Banking Game Role Play
Aug 9		Market Survey of Financial Product and its presentation
Aug 10	The Art of Questioning	Presentation and final evaluation test

**Assessment Procedure:****Evaluation Criteria:**

- 1) Final Evaluation Test: An exam will be conducted at the end of the course period to test the ability of the students in understanding different trading and financial service concepts
- 2) Games and Role Play: Pathshaala – Intraday trading game, Banking Game Role Play, Pyramid and T Shape Game will be conducted to evaluate their practical application in stock market.

**Grading Structure:**

Component	Marks
Attendance	10
Games:	
Pathshaala – Intraday trading game	20
Pyramid and T Shape Game	20
Banking Game Role Play	20
End of Course test	30
Total	100

**Anticipated Outcome:**

The value added course ‘Financial Services’ is being offered to students with an anticipated outcome of achieving in-depth practical knowledge which will help them in the long run for a successful career in the financial industry.