NSE Academy

A Set of Courses on

Global Markets, Investments, Instruments and Portfolio Management

- 10 Domestic Certifications
  10 International Certifications
- 125+ Hours of Course Content
- 2 Years Access to Knowledge Hub
- 1 Year Access to NSE Smart

Course Fee: **Rs. 25,500**
PLUS GST

Knowledge Partners

SBI

NEW YORK INSTITUTE OF FINANCE
ESTABLISHED 1922

NSE Academy | Knowledge HUB

About the Course

Embark on a learning journey with our program comprising 20 certificate courses including 10 Popular certificates in the capital market from NYIF, providing an understanding of equity market investing, money market, fixed-income securities, forex market, and equity and asset-backed derivatives.

With over 125 hours of course content, including 10 international certificate courses, participants will gain a deep insight into global capital markets, mutual funds, fixed-income securities, equity markets, derivatives, and much more.

- The learning curve evolves from the basics of securities markets to portfolio management strategies for both equity and fixed-income portfolios.
- The program covers both aspects of analysis - behavioral as well as fundamental and helps participants deep dive into financial statement analysis.
- The program builds on the concepts of financial products into risk-adjusted financial planning and wealth management processes.

20 Certification Courses

01 NRI – Business and Compliance | 10+ Hrs
02 Kiosk Banking Channel for Financial Inclusion | 5 Hrs
03 International Banking, Trade Finance – Compliance required under FEMA | 6 Hrs

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04 Global Capital Markets | 8 Hrs
05 Mutual Funds | 5 Hrs
06 Fixed Income Securities | 7 Hrs
07 Equity Markets | 7 Hrs
08 Financial Derivatives | 7 Hrs
09 Option Markets | 7 Hrs
10 Hedge Funds | 5 Hrs
11 Asset Backed Securities | 5 Hrs
12 Fixed Income Portfolio Investment Strategies | 7 Hrs
13 Equity Portfolio Investment Strategies | 5 Hrs

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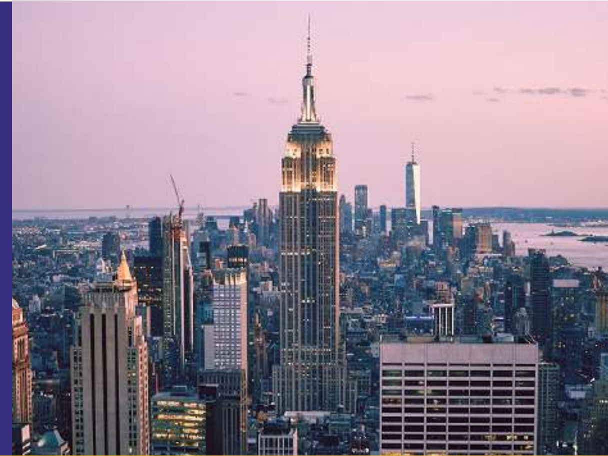
14 Investment Analysis & Portfolio Management | 3.5 Hrs
15 Analysis of Investment | 7 Hrs
16 Wealth Management | 20 Hrs
17 Behavior Finance | 10 Hrs
18 Bond Markets | 4 Hrs
19 Financial Statements | 4 Hrs
20 Financial Planning | 6 Hrs

01. NRI – Business and Compliance



Self-Paced	10+ Hours	27 Videos	Quiz Embedded

Description

This program will empower learners with knowledge of rules and regulations governing NRI Business and compliance. Often, NRIs who desire to have banking/ investment relationships in India and the banks/ Financial Institutions (FIs) who cater to NRIs find it a challenge to understand the regulations.

Further non-compliance with rules and regulations might invite avoidable penalties, fines, or strictures from the Regulator. If the operating personnel are well-versed in the regulations, it will enable them to serve niche clientele and seize growth opportunities. NRIs will also be able to avail themselves of NRI banking services smoothly and familiarize themselves with the investment opportunities available to them.

Course Outline

- Residential & Non - Residential Status of NRIs as per FEMA & Income Tax Act
- NRI Deposits and Accounts
- Investment opportunities for NRIs
- Inward & Outward Remittances
- Borrowing and lending between Non-Residents & Residents

02. Kiosk Banking Channel for Financial Inclusion

Self-Paced	5 Hours	6 Videos	Quiz Embedded

Description

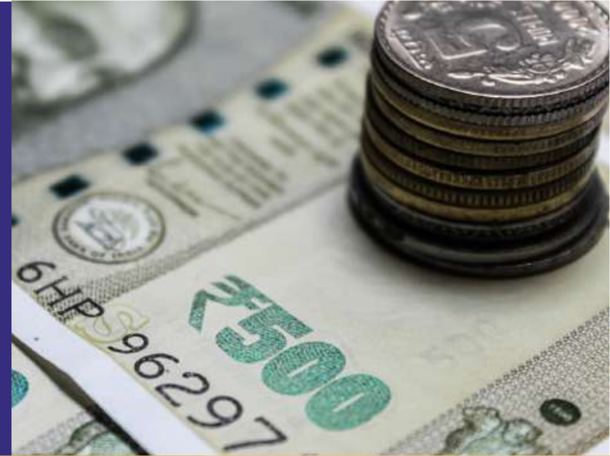
Certification in Kiosk Banking Channel empowers you to understand the features of Kiosk Banking channel to achieve the goal of financial inclusion. Moreover, it provides an understanding of important components of Kiosk Banking i.e., Financial Inclusion, Business Correspondents (BC), Customer Service Points and Kiosks (Kiosk Booth), and Kiosk Banking. This course also provides information about establishing the Kiosk Booths, technology requirements, services offered, etc. The Course is curated and offered by the State Bank Institute of Innovation & Technology (SBIIT), with a great blend of theory and operational aspects for deeper understanding.

Course Outline

This course has 7 modules as mentioned below:

- Introduction to Kiosk Banking Channel
- Concept of Financial Inclusion
- Business Correspondent (BC) model for Financial Inclusion
- Customer Service Points (CSPs)
- Establishing Kiosk & Kiosk Banking
- Use-case of SBI Kiosk Banking
- Conclusion

03. International Banking, Trade Finance – Compliance required under FEMA



Self-Paced	6 Hour	6 Modules	Quiz Embedded

Description

This program will enable learners to understand comprehensively, banking products and services available in respect of International Trade/Trade Finance along with the compliance required under “Foreign Exchange Management Act (FEMA)”. Often, units (i.e., Companies, firms, & LLPs), which are conducting international trade, desire to avail banking services in India and the banks/ Financial Institutions (FIs) which facilitate international trade find it a challenge to understand the business pattern and regulations.

Further non-compliance of rules and regulations might invite avoidable penalties, fines, or strictures from the Regulator. If the units, which are dealing with international trade or dealing officials of banks/financial institutes are well-versed with these regulations, it will enable them to develop business and ensure compliances required by the regulators.

Course Outline

This course is structured in 6 Modules, as given below

- Overview of International Banking & Trade Finance
- Export Trade & Finance including FEMA guidelines
- Import Trade & Finance including FEMA guidelines
- Remittances with FEMA guidelines
- Foreign exchange Rates, Forward Contracts &
- Derivatives Foreign Bank Guarantees

04. Global Capital Markets

Joint certification by NYIF and NSE Academy

Self-Paced	8 Hours	5 Modules	Quiz Embedded

Description

This micro certification program offers a detailed overview of the world's leading capital markets including the role and functions of money markets, and the mechanics of foreign exchange trade. The participants will learn the concept of the time value of money and through examples teach about its major applications in capital market activities, particularly in bond markets.

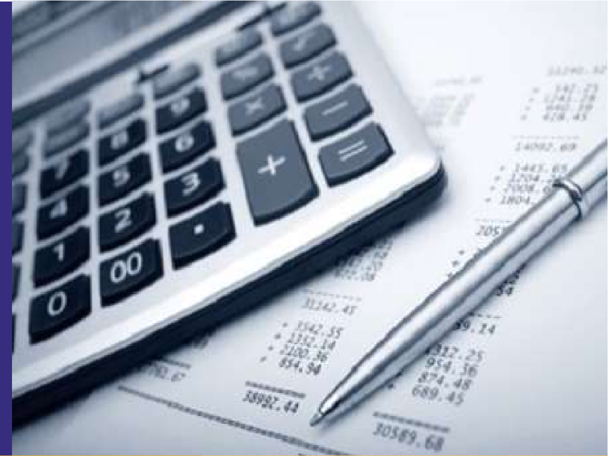
- Short Modules to deliver impactful learning.
- Summaries and exercises for each course to help you consolidate knowledge.

Course Outline

- The Major Capital Markets
- Introduction to Money Markets
- Introduction to Foreign Exchange
- Introduction to Derivatives
- Time Value of Money

05. Mutual Funds

Joint certification by NYIF and NSE Academy



Self-Paced	5 Hours	5 Modules	Quiz Embedded

Description

An introduction to the global mutual fund industry, this series explores the types of mutual funds, the fund selection process, and the structure of mutual fund companies.

Course Outline

- Understanding mutual funds
- Introduction to various mutual fund products
- Selecting the right mutual fund
- Operation of a mutual fund company
- Trends in the mutual fund industryEquity Markets

06. Fixed Income Securities

Joint certification by NYIF and NSE Academy

Self-Paced | 7 Hours | 7 Modules | Quiz Embedded

Description

This broad and practical perspective of diverse short-term and long-term fixed-income instruments is invaluable for professionals in the fixed-income arena. This course provides a solid introduction to credit risk, bond-rating systems, bond trading terminology, techniques and strategies, yield curve and the factors that affect it, and the role of the Federal Reserve system and its impact on bonds. It covers the corporate, municipal, and government bond markets, focusing on the concepts, functions, and operations of these markets.

This curriculum is made up of the following modules:

Course Outline

- Bonds and their features
- The fixed-income marketplace
- The fixed income regulatory environment
- Overview of treasury yield curve
- Factors affecting the treasury yield curve
- Introduction to the dynamic nature of the yield curve
- Role of the treasury yield curve as a benchmarking and forecasting tool

07. Equity Markets

Joint certification by NYIF and NSE Academy

Self-Paced	7 Hours	4 Modules	Quiz Embedded

Description

A detailed introduction to equity securities, this course covers the types, characteristics, and risks of common stock, preferred stock, and other equity-related instruments such as rights, warrants, and convertible bonds.

Course Outline

- Common stock
- Preferred stocks
- Equity-linked issues
- Indexes

08. Financial Derivatives

Joint certification by NYIF and NSE Academy

Self-Paced	7 Hours	4 Modules	Quiz Embedded

Description

Forwards, futures, options, swaps – this course explains the fundamentals of different derivative instruments. Tools used in hedging and speculating strategies are reviewed, as well as ways in which these tools are used by both individual and institutional investors around the world. The course covers futures pricing, the Greeks and the various options positions, and explains the basic structure of plain vanilla swaps and how corporations use swaps to manage their risk. It ends with a discussion of how futures and options are traded and the use of margin.

Course Outline

- Basics of Forwards and Futures
- Introduction to options
- Trading Derivatives
- Introduction to swaps

09. Option Markets

Joint certification by NYIF and NSE Academy

Self-Paced	7 Hours	6 Modules	Quiz Embedded

Description

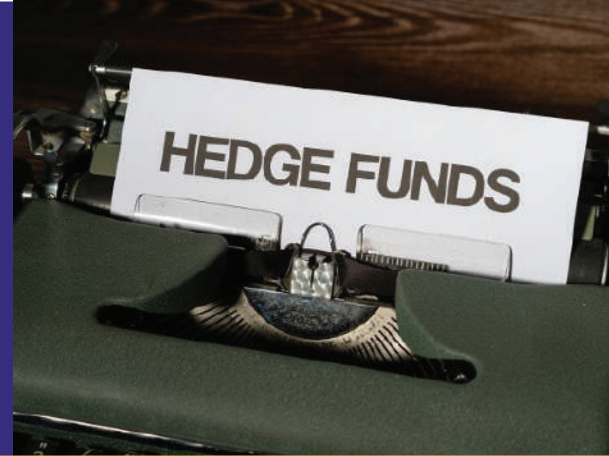
Building on the Derivative Instruments series, this intensive intermediate-level series explores the different types of options products, including options on equities, indexes, futures, foreign exchange, and interest rates. It illustrates option combination trading strategies, including horizontal and vertical spreads and volatility plays. Participants explore the various factors that have an impact on option pricing and learn how to apply the Binomial and Black-Scholes option pricing models. The series also demonstrates trading strategies and portfolio management techniques using the Greeks.

Course Outline

- Options Terminology
- Fundamentals of options products
- Option combination strategies
- Factors that impact an option’s value
- Pricing options
- Option sensitivities

10. Hedge Funds

Joint certification by NYIF and NSE Academy



Self-Paced	5 Hours	5 Modules	Quiz Embedded

Description

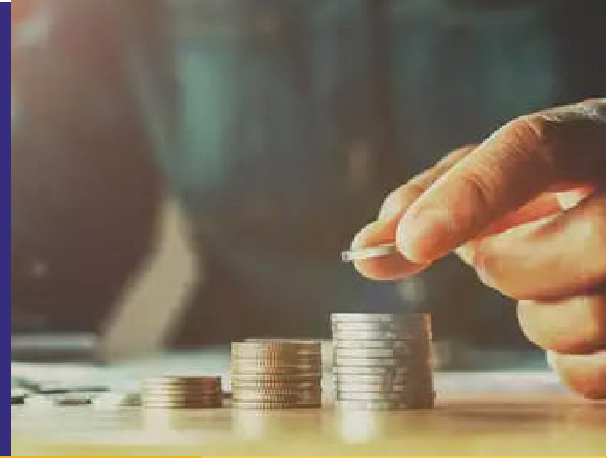
Developing, offering, marketing, and investing in hedge funds is one of the fastest-growing and least understood sectors of the asset management industry. This series presents a comprehensive and accurate picture of the hedge fund industry, various hedge fund strategies, hedge fund operations, and considerations for hedge fund investors.

Course Outline

- Hedge fund Overview
- Hedge Funds Investment Strategies
- Analysing Hedge Funds
- Hedge Funds Industry Infrastructure
- Hedge Funds Industry Trends and Challenges (Issues)

11. Asset Backed Securities

Joint certification by NYIF and NSE Academy



Self-Paced	5 Hours	5 Modules	Quiz Embedded

Description

This micro certificate guides students through the evolution of asset securitization, which results in new products for investors and expanded sources of funding and risk transfer opportunities for issuers. It shows how asset-backed security is constructed, rated by credit agencies, traded, and valued. The modules also explore the different ABS market segments, from the large, established segments like automobile loans, to emerging and subprime market segments. The certificate concludes with a look at emerging trends in the industry.

Course Outline

- Introduction to asset-backed securities
- Structure and rating of asset-backed securities
- Major sectors of the asset-backed securities market
- Pricing and trading of asset-backed securities
- The future of the asset-backed securities market

12. Fixed Income Portfolio Investment Strategies

Joint certification by NYIF and NSE Academy

Self-Paced	7 Hours	3 Modules	Quiz Embedded

Description

Fixed Income Portfolio Management is a comprehensive survey of the key drivers and features of managing a portfolio of fixed-income assets. This thorough and interactive course offers students like you, a detailed grounding in the full range of fixed-income product categories and portfolio management techniques.

You will leave this online class with a clear understanding of key products and investment management strategies used by portfolio managers, enhancing the opportunity for success in this increasingly complex area.

Course Outline

- Review of Fixed Income Products
  - Fixed income arithmetic
  - Fixed income instruments
  - Term structures of rates and yields
  - How are bonds traded?
  - Duration and Convexity
  - Corporate bonds and credit risk
- Passive Fixed Income Portfolio Strategies
  - Fixed income indexes
  - Index funds and replication techniques
  - Tracking error minimization
  - Cash flow matching
  - Immunization techniques
- Active Fixed Income Portfolio Strategies
  - Rate prediction strategies
  - Yield curve strategies
  - Interest rate scenario analysis
  - Credit Strategies
  - Tactical allocation strategies
  - Relative value strategies

13. Equity Portfolio Investment Strategies

Joint certification by NYIF and NSE Academy

Self-Paced	5 Hours	2 Modules	Quiz Embedded

Description

Equity Portfolio Management is a comprehensive survey of the key drivers and features of managing a portfolio of equities. In this course, you learn in detail about the full range of equity product categories and related portfolio management techniques.

By the end of this series of modules, you will gain an understanding of key equity products and investment management strategies used by portfolio managers, enhancing the opportunity for success in this increasingly complex area.

Course Outline

- Review of Equity Valuation Techniques
  - Importance and quality of earnings
  - Present value models
  - Multiples based valuation
  - Asset-based valuation models
  - Industry and company analysis
- Equity Strategies
  - Structuring an equity portfolio
  - Use of indexes
  - Hedging with options
  - Short selling
  - Growth strategies
  - Value strategies

14. Investment Analysis & Portfolio Management

Self-Paced	3.5 Hours	9 Modules	Quiz Embedded

Description

Investments are common among all investors from individuals to fund managers and institutions. However, analysis and investments based on such analysis are carried out by trained managers and informed investors. This course helps the learner understand all types of investments and analyse them with a need to invest effectively and efficiently. It covers all investments including equity, debt, and derivatives. Investing in markets that are not at the same efficiency level, analysing individual investments and handling portfolios are some of the skills that this course covers.

Course Outline

- Objectives of Investment Decisions
- Financial markets
- Capital market Efficiency
- Financial markets
- Fixed Income Securities
- Capital market Efficiency
- Financial Analysis and Evaluation
- Modern Portfolio Theory
- Valuation of Derivatives
- Investment Management

15. Analysis of Investment

Self-Paced	7 Hours	7 Modules	Quiz Embedded

Description

This course demystifies the concept of investments and their analysis. It covers both fundamental and technical analysis to make informed investment decisions. It also covers asset allocation and how to make investments based on such analysis. This comprehensively covers both company and market analysis.

Course Outline

This course has 7 modules as mentioned below:

- Introduction to Fundamental Analysis
- Understanding Financial Statements
- Valuation Methodologies
- Introduction to Technical Analysis
- Candle Charts
- Pattern Study
- Asset Allocation

16. Wealth Management

Self-Paced	20 Hours	9 Modules	Quiz Embedded

Description

This course explains investment strategies and performance evaluation. It will help you to manage your wealth and plan your portfolio. It will also help in tax and estate planning and give various financial planning strategies. This will help you allocate wealth through a systematic understanding of risk and reward and planning specific goals.

Course Outline

This course has 7 modules as mentioned below:

- Introduction to Financial Planning
- Asset Classes
- Financial Planning Tools
- Asset Allocation
- Modern Portfolio Theory
- Measuring Risk and Return
- Elements of the Financial Plan
- Tax Planning
- Customer Relationship Management

17. Behavior Finance

Self-Paced	10 Hours	1 Module	Quiz Embedded

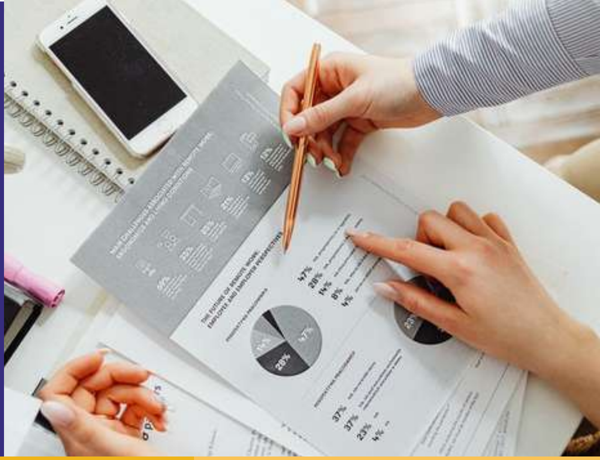
Description

Financial investments and wealth creation are hot topics among all types of investors big or small. This short course discusses various aspects of behavioral finance and decision-making. This course is suitable for investors who want to take prudent decisions in their wealth creation journey. No specific knowledge of financial terms is needed. The course content is suitable for beginners. The course is also ideal for finance and economics students to get a firm ground on essential behavioral finance concepts to study the subject further.

Course Outline

- Introduction to Financial Planning
- Fundamentals of Behavioural Finance
- Introduction to Course
- What is behavioural finance? How is it different from traditional finance?
- What are the different types of biases that exist in investors' behaviour?
- How to mitigate risks due to behavioural biases while investing?
- How does the endowment effect influence investors in decision-making?
- Can Artificial Intelligence and machine learning take better financial decisions?
- Can Artificial Intelligence help in taking rational investment decisions?
- Will AI/ML-based investments/trading dominate the future?
- Will AI/ML replace the investment thesis for investors in a start-up?

18. Bond Markets



Self-Paced	4 Hours	4 Modules	Quiz Embedded

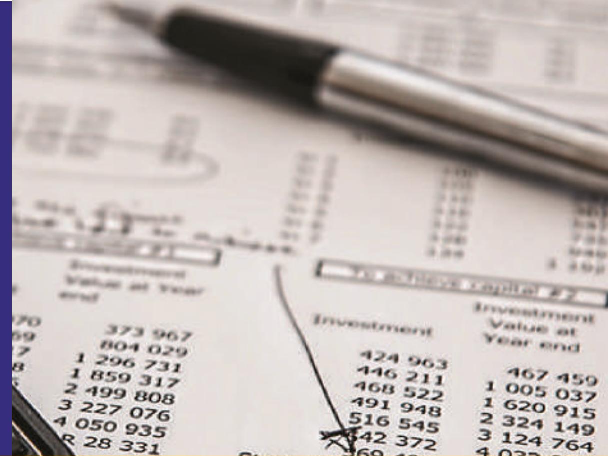
Description

Fixed-income securities (Bond Market and Money Market) constitute a significant portion of the capital market and represent the entire money market. A student of Finance must get adequate exposure to this topic, from the perspective of a future career in Finance. The course assumes a basic understanding of mathematics and mathematical applications. It deals with bond valuation, risk measures, interest rates, and the valuation of money market securities. The course will involve extensive use of EXCEL.

Course Outline

- Fundamentals of Bond and Bond Markets
- Introduction to Bond Market
- Bond Valuation
- Zero Coupon Bond - capital gain or loss
- Types of Risk

19. Financial Statement



Self-Paced	4 Hours	2 Modules	Quiz Embedded

Description

This course helps in understanding the fundamentals of the company. Understanding them from the financial statements along with the reports published in the annual reports is always a challenge. There are a plethora of things related to the figures in financial statements which makes it difficult for the investor to analyze. This course helps in understanding what the financial statement comprises and what should an investor choose for his analysis. By completing this course, you can evaluate the overall health of any company, and its business value along with understanding companies' future risks and potential.

Course Outline

- **Profit & Loss (P&L) Statement**: The components of a P&L
- **Cash Flow Statement:** The concept of a Cash Flow Statement and its break-down into Financing, Investing and Operational Cash flows.
- **Statement**: Measures of profitability, and items of expense.
- **Balance Sheet:** A detailed discussion on various components of a Balance Sheet, such as Current Assets, Owner's Equity, Contingent Assets & Liabilities etc

20. Financial Planning

Self-Paced	6 Hours	4 Modules	Quiz Embedded

Description

This course helps you to understand your financial goals and assists in growing, managing, and protecting wealth. The course also helps in understanding various asset classes, and portfolio classification based upon the proportion of various asset classes. Essentially, it helps you be in control of your income, expenses and investments such that you can manage your money and achieve your goals. The importance of personal financial planning cannot be ignored. It is not just about increasing your savings and reducing your expenses.

Course Outline

- Introduction to Financial Planning
- **Model Portfolios:** Portfolio maintenance and rebalancing
- **Performance Attribution**: Analysing the portfolio according to the asset class and the markets
- **Risk Profiling:** Classification of clients based on the Risk-return principle
- **Risk-Adjusted Return**: Risk Adjusted Return' measures such as Sharpe Ratio, Treynor Ratio etc.

Contact Details

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Refund Policy

- Registration Fees paid by the candidate shall not be refunded under any circumstances after the login id of the application has shared to candidates
- In case the registered candidates wishes to cancel the registration for the Certificate Programs, the candidate shall intimate NSE Academy via a written request/Email request minimum 2 working days prior to the commencement of the Certificate Programs or sharing the login id of the application. Once approved the candidate will be refunded 90% of the total course fees paid for the respective Certificate Programs.