

CURRICULUM

Mutual Fund Agent

(BSC / Q 0601)

This programme is aimed at training candidates for the job of “Mutual Fund Agent” in the BFSI Sector and by the end of the programme aims at building the following key competencies amongst the learner:

1. Understand Mutual Fund and it's Structure.	2. Understanding Fund distribution and sales practices.
3. Knowledge of accounting, valuation and taxation on mutual fund.	4. Understand financial planning.
5. Knowledge of business ethics.	6. Establishing good working relationships with colleagues.
7. Effective communication and personality development.	

This course encompasses 4 out of 4 National Occupation Standard (NOS) of “Mutual Fund Agent” Qualification Pack No “BSC/ Q 0601” issued by “BFSI Sector Skill Council”.

Sl. No	Topic/Module	Duration (Hours)	Key Learning Outcomes	Corresponding NOS Code
1)	Conduct Research	40	<ul style="list-style-type: none"> • Concept of Mutual Fund and Market. • Advantages of investing through Mutual Fund. • Evolution of Mutual Funds in India. • Register for regular stock market updates for additional insights • Develop basic profile of target customers 	BSC/N0601

Sl. No	Topic/Module	Duration (Hours)	Key Learning Outcomes	Corresponding NOS Code
2)	Market and Sale Mutual Fund	40	<ul style="list-style-type: none"> Types of Funds and role of financial regulators in India. Studying the contents of offer Documents and its importance. Understanding Fund distribution and sales practices Approach and market various mutual funds schemes to prospective customer identified Assist customer to determining most suitable mutual fund scheme 	BSC/N0602
3)	Assist With Purchase of Mutual Fund	40	<ul style="list-style-type: none"> The concept of financial planning. Recommending and selecting the right investment products for the customers Assist customer with the application process for purchasing the mutual fund Collect and ensure payments are processed at the bank/organization Explain the payment process and accepted payment methods to the customer Understand the different types of funds available in the market. Introduction to Rights and Obligations of the Investors Fund. 	BSC/N0603
4)	Perform After Sales Activities	30	<ul style="list-style-type: none"> Develop long term relationships with customers. Respond to customer queries and clarifications and advise the customers. Assist in termination of investment. Understanding the risks involved in various Mutual Funds investments. Assist customers with managing their risk 	BSC/N0604

Sl. No	Topic/Module	Duration (Hours)	Key Learning Outcomes	Corresponding NOS Code
			<ul style="list-style-type: none"> • Inform customers of any changes in performances that might impact their investment • Understanding the meaning of Business Ethics and its need. • Business Ethics and Fund Regulation in India. 	
5)	Communication & Soft Skills	50	<ul style="list-style-type: none"> • Communication- verbal& non-verbal communication skills and effective communication • Telephone etiquettes Personal etiquettes • Time and money Management. • Interpersonal/ Negotiation/Persuasive skills • Analytical Ability 	General Module

Total Programme Duration : 200 hours

(This syllabus/curriculum has approved by BFSI Sector Skill Council)