



Since 1994

Marathwada Mitra Mandal's
**INSTITUTE OF MANAGEMENT EDUCATION RESEARCH AND TRAINING
(IMERT), Pune**

S. No. 18, Plot No. 5/3, CTS No. 205, Behind Vandevi Temple, Karvenagar,
Pune – 411052



5.1.3

**Percentage of Students Benefitted by
Guidance for Competitive
Examinations and Career Counselling
Offered by the Institution During the
Last Five Years**



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Pune – 411052



**Report of Program with Photographs with Captions of such
Programs along with Details of the Resource Persons.**

And

**Year-Wise List of Students Attending these Schemes, Signed
by Competent Authority**



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Pune – 411052



Sr. NO	List of the report of program with photographs with captions of such programs along with details of the resource persons.
	A.Y. Year 2018-19
1	Private Banking and Personal Finance
2	NISM IMERT Certificate in Security Market



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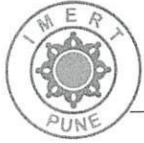


**Report of Program with Photographs with Captions of such
Programs along with Details of the Resource Persons.**

And

**Year-Wise List of Students Attending these Schemes, Signed
by Competent Authority**

Year 2018-19



Date: 20th Sep. 2018

Notice for Students

This is to inform you that three days workshop on "Certification workshop on Private Banking and Personal Finance" by ICICI-direct Centre for Financial Learning will be conducted on (**27th 28th and 29th September 2018**) for MM's IMERT MBA-Banking & Insurance + Marketing Students.

Those who have registered their names for the program they are expected to attend the program.

Dr. Shriram Nerlekar,

Director-IMERT,

Pune



		Dr. Shriram Narlekar Director, IMERT
Prepared By	Reviewed / Recommended By	Approved By



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Title of the Certificate Course: "Workshop on Private Banking and Personal Finance"

No. of Hours: 30 Hrs

Name of the agency: ICICIdirect Centre for Financial Learning

Name of the resource person: Mr. Mobin Shaikh

Date of the Programme: 27th 28th and 29th September 2018

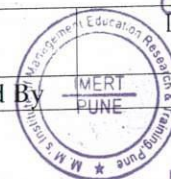
Programme Objective:

1. To provide the understanding of financial planning and its usage for client relationship management.
2. To provide the knowledge of various asset class and goal specific asset allocation.
3. To provide skill development in portfolio foundations, traditional assets, alternative assets and understanding the clients.

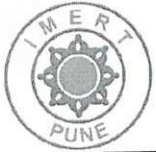
Course Contents:

Sr. No	Module Name & Syllabus	Duration	Lab / Theory
1	Module 0 : Introduction to Financial Planning	4 hours	Lab
	· Financial planning process		
	· Time Value of Money		
	· Goal Based Financial planning		
	· Financial Functions through excel		
2	Module 1 : Introduction to Private Banking	2 hours	Theory
	· Traditional banking		
	· Difference between traditional and private banking		
	· Scope and growth of Private banking		
	· Functions of Private Banking		
3	Module 2: Portfolio foundations	2 hours	Theory
	· Risk and Returns		
	· Correlation of assets		

<i>Vinod</i>	CERTIFIED TRUE COPY Dr. Shiram Nanekar Director, IMERT
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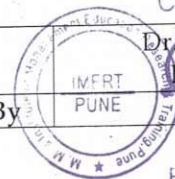


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(IMERT), Pune**

	<ul style="list-style-type: none"> Portfolio Impact of addition of Alternative assets to risk and return characteristics 		
4	Module 3: Traditional Assets <ul style="list-style-type: none"> Equity investments Equity and its features Ways to invest in equity – Direct / Indirect Equity Mutual Funds – Ways to choose the correct fit Case Studies Fixed Income Fixed Income and its features Ways of getting Fixed Income Exposure GILTS Investment grade corporate bonds Junk Grade Bonds Inflation protected Bonds Debt Mutual funds – Selecting a particular debt fund Case studies Real Estate Real estate and its features Ways to take Real Estate exposure Direct Indirect – REITS Case Studies Gold Investment 	6 hours	Theory + Demo of V Stocks (Cash Trading)
4	Module 4 : Retirement and Insurance Planning <ul style="list-style-type: none"> Retirement corpus calculation Retirement products Insurance Need Analysis Insurance Products 	4 hours	Theory + Case studies
6	Module 5 : Creating and managing Relationships <ul style="list-style-type: none"> Getting into the shoes of private banker Understanding advisory and distribution Understanding clients Mapping products to goals 	2 hours	Theory + Role plays

Vinod

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Prepared By	Reviewed / Recommended By	Director Marathwada Mitra Mandal's Institute of Management Education Research & Training Page 2 of 3






Course Outcomes:

1. Usage of financial planning for client relationship management.
2. Apply knowledge for various asset class and goal specific asset allocation.
3. Use concepts of Private Banking and Personal Finance for portfolio foundations, traditional assets, alternative assets and understanding the clients.

Benefits to the students/ participants. :

- Learning from the Industry Practitioners - Strengthening of curriculum by adding practical knowledge from ICICI Securities, which has 18+ years of domain expertise in Financial Planning, Wealth Management and Capital Markets
- Industry/ Subject Experts as Faculty to deliver the training
- Highly researched study material having real market cases and illustrations
- Simulation to on-line trading and access to live markets
-

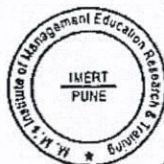
Expected batch size: 15 participants.

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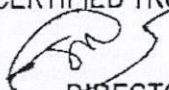
M. M. Institute of Management Education
Research & Training, Pune
Page 3 of 3..

Private Banking and Personal Finance workshop.
27th -28th 29th September 2018

SR. NO	NAME OF STUDENT
1	JAYASHREE KHODKE
2	KRISHNA WANKHEDE
3	DIPALI PAWAR
4	NEHA SHELAR
5	SAURABH GARGOTE
6	NEHA DESHMUKH
7	RADHA WANKHADE
8	HINA SHAIKH
9	MANISHA SAPKAL
10	AVINASH CHAVAN
11	VIJAY SWAMI
12	YASH CHAUDHARY
13	JIGAR JADAV
14	ASIF SHAIKH



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Certificate of Participation

This is to Certify that

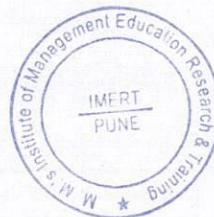
Krishna Wankhede

has participated in the
Private Banking and Personal Finance Workshop
held on 27th Sept. 2018 to 1st Oct. 2018
at Institute of Management Education Research and
Training (IMERT) – Pune.



Neeraj Joshi

(Head - ICICIdirect Centre for Financial Learning)



Corporate Office: Shree Sawan Knowledge Park, Plot No. D-507, T.T.C. Industrial Area, MIDC Turbhe, Navi Mumbai - 400705
Tel: (91-22) 4070 1000 Fax: (91-22 4070 1022)

Registered Office: ICICI Centre, Churchgate, Mumbai - 400020, India

Certificate of Participation

This is to Certify that

Jayashree Khodke

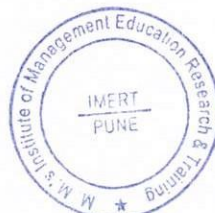
has participated in the
Private Banking and Personal Finance Workshop
held on 27th Sept. 2018 to 1st Oct. 2018
at Institute of Management Education Research and
Training (IMERT) – Pune.



Neeraj Joshi

(Head - ICICIdirect Centre for Financial Learning)

 **ICICI direct**
Centre for Financial Learning



Corporate Office: Shree Sawan Knowledge Park, Plot No. D-507, T.T.C. Industrial Area, MIDC Turbhe, Navi Mumbai - 400705

Tel: (91-22) 4070 1000 Fax: (91-22) 4070 1022)

Registered Office: ICICI Centre, Churchgate, Mumbai - 400020, India



Report on
Three day workshop on
Certification workshop on Private Banking and Personal Finance

For the Banking and Insurance Management students, IMERT conducted certification Workshop on Private Banking and Personal Finance on 27th, 28th and 29th September 2018 . This was 30 hrs. Workshop conducted by ICICIdirect Centre for Financial Learning. The focus of this workshop was to make student familiar with the concept of Financial Planning, Private Banking, Portfolio foundations, Traditional Assets, Retirement and Insurance Planning and Creating and managing Relationships. This workshop was conducted by **Mr. Mobin Shaikh**, a renowned Certified Financial Planner. Mr. Mobin Shaikh shared his practical experience with students and shared some of his clients cases. This certification programme will help our students for better placement in Financial market and Banking sector too.

The syllabus for Workshop on Private Banking and Personal Finance Module wise was as follows:-

- Module 0 : Introduction to Financial Planning.
- Module 1 : Introduction to Private Banking.
- Module 2: Portfolio foundations.
- Module 3: Traditional Assets.
- Module 4 : Retirement and Insurance Planning.
- Module 5 : Creating and managing Relationships.

		<p style="text-align: right;"> CERTIFIED TRUE COPY DIRECTOR M. M.'s Institute of Management Education Research & Training, Pune Dr. Shiram Nerlekar Director, IMERT </p>
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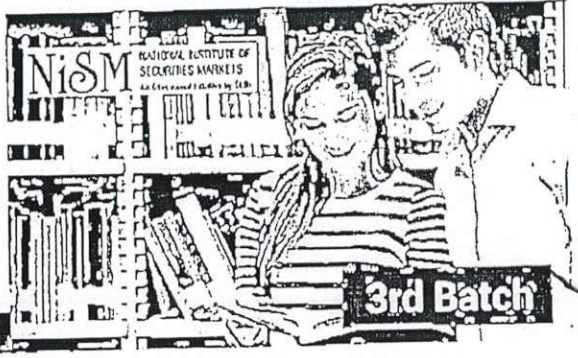
ICSM



**MARATHWADA MITRA MANDAL'S
INSTITUTE OF MANAGEMENT EDUCATION
RESEARCH AND TRAINING**
(A premier B school since 1994)



Commencement
of the program
25th August 2018



[www.nism.ac.in](#) [www.mertpune.in](#)

About NISM IMERT Certificate Course in Securities Markets (NICSM)

Thank you for your interest in NICSM. We will be in touch to answer your questions.
([http://www.lfcountryclub.com/thank-you/](#))

IMERT Certificate Course In Securities Markets (NICSM) is a joint program being run by National Institute of Securities Markets (NISM), an institute promoted by Securities and Exchange Board of India and Marathwada Mitra Mandal's, Institute of Management Education, Research and Training (IMERT), Pune, a premier B school. The objective of this certificate program is to prepare graduate and undergraduate students for successful careers in the Securities Markets.

Duration of program

Total 104 hours- 92 hours of teaching and college exam , 6 hours of simulation training and 6 hours of NISM Certifications exam | Sessions will be conducted on Saturdays | Maximum duration: Four Months.

[Download Brochure \(http://nism.ac.in/images/academic_programs/NICSM/Brochure-batch-july2018.pdf\)](#)

Regards,

NISM Team

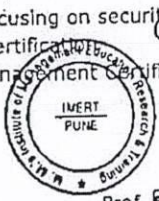
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For detailed Program Architecture click here ([/index.php/academic-programs/short-term-programs/nism-imert-certificate-course-in-securities-markets-nicsm?layout=edit&id=902](#))

Course Structure

This Four Months Weekend Program focusing on securities markets covers following three subjects:

- Mutual Fund Distributors (MFD) Certification
- Securities Operations and Risk Management Certification
- Research Analyst Certification



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Contact Us:

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Prof. Sachinkshirsagar
Mobile: 8446644462
Email: sachinkshirsagar@imertp
(mailto:sachinkshirsagar@imertp)

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Apply now ([https://www.onlinesbi.com/prelogict/home.htm?corpID=636455](#))

Go to [http://nism.wufoo.com/forms/interested-in-attending-events-at-nism/](#) for more details

venue for the program

Marathwada Mitra Mandal's
Institute of Management
Education Research and Training
302/A, Deccan
Pune, Pune-411 004.

Program is proposed to commence on 25th August
2018 to be conducted over Four Months.

Timing: 10 to 5:30 pm (Saturday)



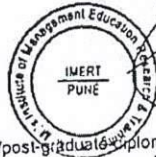
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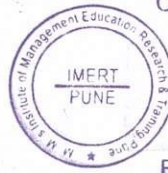


(https://nism.wufoo.com/forms/interested-in-attending-events-at-nism-/)

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www.nism.ac.in/index.php/academic-programs/short-term-programs/nism-im

NICSM	NISM IMERT Certificate in Securities Markets
Batch 3	
1	Keshao Gajanan Kalore
2	Janhavi Rajendra Gaikwad
3	Minal A. Karale
4	Prachi Dhage
5	Prathamesh Kulkarni
6	Shubham P. Hajare
7	Leena Pawar
8	Pooja Kapare
9	Somani Vaishnavi Girira
10	Shivani Baban Baravkar
11	Shivani Jaywant Bibave
12	Vaishnavi Deepak Ladkat
13	Vaishnavi Chopda
14	Shruti Mahesh Mandvekar
15	Adesh Sudhir Ghogare



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