



EY CAFTA's Certificate in Investment Management



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About the course

Companies across the world generate surplus cash and are always looking at investment avenues to deploy this cash to generate optimum returns. However, each investment option comes with some inherent credit risk or market risk. Companies must evaluate risks in different investment products and based on their risk appetite, choose the right investment product to generate incremental yield.

This module deep-dives into different risks, nuances and nitty-gritty of various investment products such as money markets, Gsec, corporate bonds, ETFs , mutual funds, AIF, REITs and structured products.

It gives practical insights into operations of investment management function at different industries such as corporates, bank, insurance companies, asset management companies and pension funds.

Participants also get to understand the governance structure, regulatory aspects and the decision making criteria for each of these five industries for investment function.



Table of contents

Overview of investment management

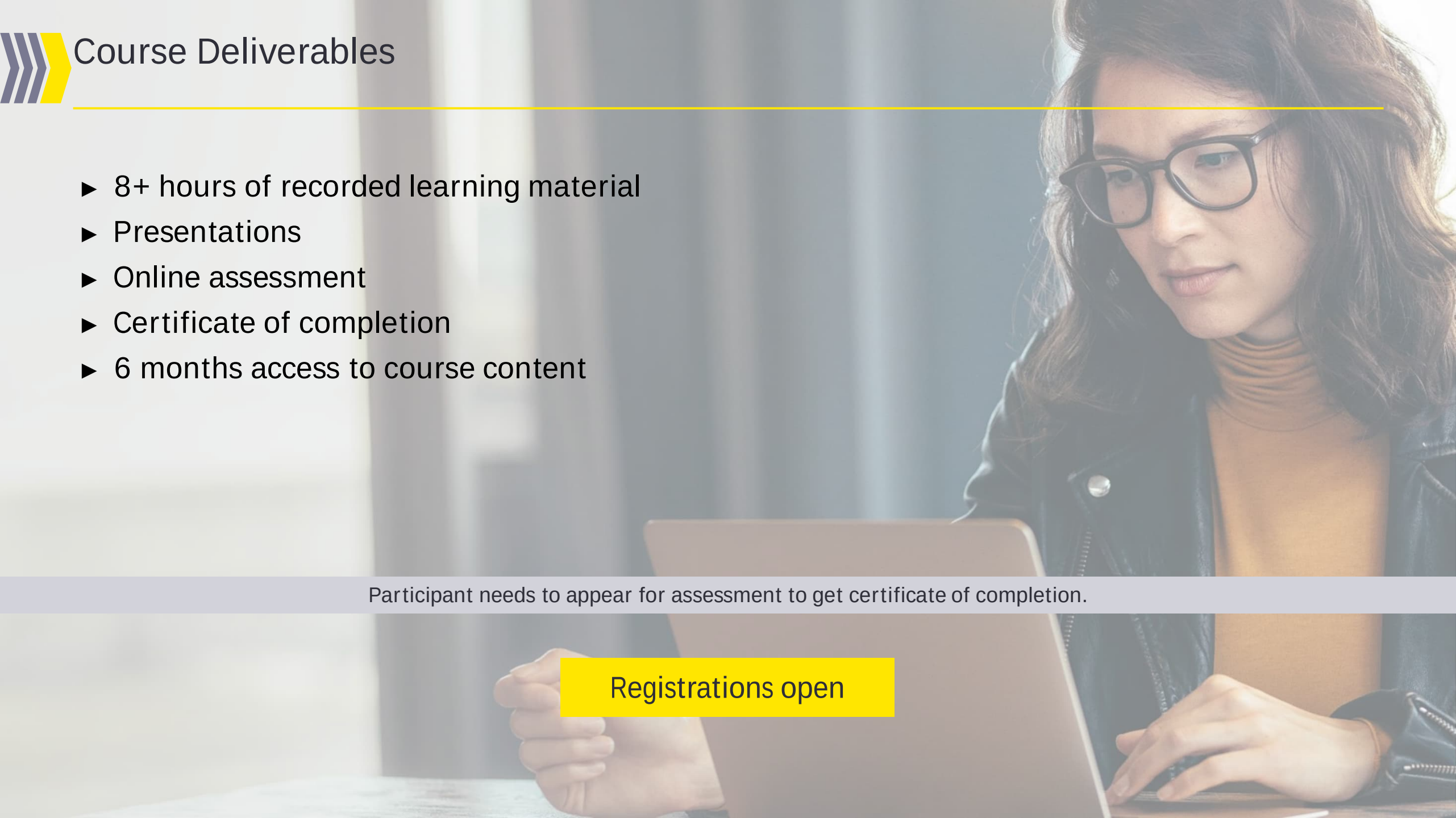
- ▶ Concepts and overview of types of risk
- ▶ Investment objectives and overview of investment functions

Investment products in treasury

- ▶ Products in India: money markets, government securities, corporate and FI debt, equities ETF, AIF, mutual funds
- ▶ Industry insight: Trading in G Sec, AT1 bonds and its impact, various facets of mutual fund industry, red flags in investment products
- ▶ Products in global market: market linked notes, dual currency, enhanced yield note and REITs
- ▶ Use case: use of analytics, technology and quant models in investments

Investment function in various industries

- ▶ Criteria for investment management policy and decision making
- ▶ Investment functions in corporate, its governance structure, cash forecasting, tiers of investable surplus
- ▶ Use cases for corporate: allocation of money across different asset classes, early warning indicators, monitoring concentration credit risk
- ▶ Investment function in insurance companies, banks, asset management companies and pension funds
- ▶ Use cases: portfolio benchmarking of ULIP products in insurance companies, selection criteria for optimum instrument in banks, risk monitoring for mutual fund investment, post deal monitoring in pension funds

A woman with long brown hair, wearing glasses and a black leather jacket over a tan turtleneck, is sitting at a desk and working on a laptop. The background is a blurred indoor setting with light-colored walls and a window.

Course Deliverables

- ▶ 8+ hours of recorded learning material
- ▶ Presentations
- ▶ Online assessment
- ▶ Certificate of completion
- ▶ 6 months access to course content

Participant needs to appear for assessment to get certificate of completion.

Registrations open

Assessment and certification



EY will award a Certificate of Completion to participants at the end of the program

- ▶ MCQ assessment to be conducted on the fourth Saturday of the month (participant is eligible to take the assessment within six months of registration)
- ▶ Duration – 30 min – 15 Question
- ▶ Participants get max 2 attempts to clear the assessment
- ▶ Participant needs to achieve a minimum score of 50% to pass the exam
- ▶ All participants meeting the above criteria to be awarded e-certificates as Certificate of Completion

Join CAFTA to get ahead of your competition

Course fee

Certificate in Investment risk management INR 3,000 + taxes
Special pricing for more than one certificates

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