



Dear Sir/ Madam

We are pleased to propose a collaborative initiative between your esteemed institution and Finmonk India to deliver a specialized training and coaching program for the NISM Series VA – Mutual Fund Distributor Certification Examination. This program aims to enhance students' financial proficiency, equipping them with job-ready skills and a recognized certification from SEBI/NISM, opening pathways to promising careers in the mutual fund industry.

Course Details

Course Title: NISM Series VA – Mutual Fund Distributor Certification

Total Duration: 45 Hours (3 hours/day for 15 days)

Final Examination: NISM Series VA Certification Exam

Additional Benefit: 5 Mock Tests for practice

Minimum Enrolment: 50 students

Course Objective: To prepare students for the NISM Series VA certification by imparting comprehensive knowledge of mutual fund products, distribution practices, regulatory framework, and investor servicing skills. This course will enable participants to register as certified mutual fund distributors and explore career opportunities in the BFSI sector.

Module Breakdown

Module 1

Basics of Mutual Funds (6 Hours)

- What is a Mutual Fund?
- Structure of Mutual Funds in India
- Benefits and Limitations
- Types of Mutual Fund Schemes

Module 2

Legal & Regulatory Framework (6 Hours)

- Role of SEBI, AMFI, and other regulators
- SEBI Regulations applicable to Mutual Funds
- AMFI Code of Ethics
- Due Diligence and KYC Norms

Module 3

Understanding Mutual Fund Products (9 Hours)

- Open-ended vs. Closed-ended Funds
- Equity, Debt, Hybrid, Index, and Sector Funds
- Systematic Investment Plans (SIPs) and SWPs
- NAV Calculation, Loads, and Expense Ratios

Module 4

Risk, Return & Performance Measurement (9 Hours)

- Risk and Return Concepts
- Benchmarking and Performance Ratios
- Alpha, Beta, Standard Deviation
- Role of Rating Agencies

Module 5

Taxation & Investor Services (6 Hours)

- Taxation of Mutual Fund Investments
- Capital Gains Tax & TDS
- Services to Investors and Redressal Mechanisms

Module 6

Sales Practices and Business Ethics (9 Hours)

- Prospecting and Client Onboarding
- Suitability and Risk Profiling
- Selling Skills and Documentation
- Ethical Practices in Mutual Fund Distribution

Institution's Role

- Provide infrastructure (classroom, projector, whiteboard, etc.)
- Promote the program and coordinate student enrolment
- Distribute printed mock test materials
- Ensure minimum enrolment of 50 students
- Provide lodging and boarding for the trainer for 15 days

Our Role

- Deliver training sessions through certified finance professionals
- Provide softcopy of study materials and practice questions
- Conduct 5 mock tests with evaluation
- Guide students through the NISM exam registration process

Additional Value: Internship & Placement Assistance

Finmonk India will provide:

- 100% Internship Assistance with brokerages, trading firms, and financial institutions
- 100% Placement Support for successful students in roles such as Derivatives Analyst, Equity Trader, and Market Strategist
- Career counseling, interview preparation, and resume building support

Expected Outcomes

- All students who successfully complete the course and pass the NISM Series VA Certification Exam will receive:
- 100% Assistance in Internship Placement with registered Mutual Fund Distributors, Financial Advisors, or AMCs
- 100% Assistance in Job Placement for suitable roles in the BFSI sector
- Personalized career guidance and interview preparation support

We would be delighted to discuss this proposal in more detail and explore how we can tailor the program to meet your institution's specific needs and timelines. Looking forward to a fruitful and impactful collaboration.

Lets stay In touch

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