

Title	Mutual Fund Agent	
Duration	30 Hours	
Course Credits	2	
Mode of Lectures	Theory	
Medium of Instructions	English	
Pre-Requisite:	12 th pass	
Objective of the Course:	The objective of the course is to be aware of various types of Mutual fund schemes available in the Indian market. The students will be taught different types of mutual fund schemes and increase a knowledge of Mutual fund.	
Expected outcomes of the course:	Learning of Various Mutual fund schemes. Update knowledge on mutual fund market.	
Course Content	<p>1: Conduct Research</p> <p>1.1 Concept of Mutual Fund and Market.</p> <p>1.2 Advantages of Mutual Fund.</p> <p>1.3 Evolution of Mutual Funds in India.</p> <p>1.4 Register for regular stock market updates for additional insights.</p> <p>1.5 Develop basic profile of target customers</p>	6
	<p>2: Market and Sale Mutual Fund</p> <p>2.1 Types of mutual fund in India.</p> <p>2.2 Studying the contents of offer Documents and its importance.</p> <p>2.3 Various types of mutual fund schemes in India.</p> <p>2.4 Understanding Fund distribution and sales practices.</p> <p>2.5 Parameter and criteria for selecting the best mutual funds.</p>	8
	<p>3: Assist With Purchase of Mutual Fund.</p> <p>3.1 The concept of financial planning.</p> <p>3.2 Assist customer with the application process for purchasing the mutual fund.</p> <p>3.3 Collect and ensure payments are processed at the bank/organization.</p> <p>3.4 Explain the payment process and accepted payment methods to the customer.</p> <p>3.5 Understand the different types of funds available in the market.</p>	8

	<p>4: Perform After Sales Activities</p> <ul style="list-style-type: none">4.1 Develop long term relationships with customers.4.2 Respond to customer queries and clarifications and advise the customers.4.3 Understanding the risks involved in various Mutual Funds' investments.4.4 Assist customers with managing their risk	8
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Reference Books:

- E. Gordon, K. Natarajan (2010) Financial Markets and Services (Six Edition)
- Zvi Bodie, Alex Kane, Alan J Marcus, Pitabas Mohanty. Investments (Eight Edition).