

Financial Services Basics Module Synopsis

The course “Financial Services Basics” will aim to introduce innovative investment avenues to all of you and make you aware about these products and services. Course will have a few theory sessions and few practical / application oriented sessions where a lot of hands-on experience will boost your expertise. The sessions will have activities (individual and group) which will bring the best out of you in the form of presentations and small projects.

Session Details:

Session 1: Basics of financial statements and introduction to trading

Though most of you have had an exposure to financial statements of the company, you may not be well versed with the techniques and tools to analyze them and take a decision based on that. In this introductory session, we will see how to analyze financial statements with the help of different techniques and apply the learning in real life by playing the Virtual Stock Trading Game.

Session 2: Crowd funding

In this session, we will see in detail what is crowd funding, its requirements, regulations, types and eventually a few case studies which will propel us to think more towards Crowd Funding as one of the possible investments. A case study based approach will be taken for this session.

Session 3: Microsoft Excel 1

We all use Microsoft Excel but still we do not even use 1% of the power excel has given us. While analyzing financial statements of company, if we are expert in tools and formulae in excel, we can perform the analysis faster. This session helps build the base of using excel from financial statement analysis aspect.

Session 4: Crypto Currency

I am sure everyone must have heard of Bitcoin and I am also sure that very few will have an actual idea what that is or how that functions. In this session, we will try to explore Crypto currency and the domain around it to understand this area better.

Session 5: Microsoft Excel 2

Post excel session 1, this session will expose you to a set of rules and formulae of slightly advanced level which will perform complex tasks for you while analyzing huge data.

Session 6: Basics of banking system in India

Banks form an integral part of our financial system and hence our life and yet we are unaware of the functions and different terminologies with respect to the banking system. This session aims to give you a basic background of the banking sector in India.

Session 7: Advanced financial statement analysis

This session is one step ahead of the first session where we saw how to analyze a company to pick the stock. This session will dig deeper into understanding the company’s qualitative and quantitative factors with the help of tools that we studied in Excel sessions.

Session 8: Personal finance (Mutual fund, SIP)

Once we start earning, we feel the need to invest our money so it multiplies and our wealth is enhanced. The best way today to start a safe investment would be through Mutual Funds and SIPs.

This session will give you the required knowledge to think about your own finances right from the basics and enable you to take your financial decisions independently.

Session 9: Alternative finance investment options

Along with Mutual fund and SIP, a lot of innovative investment avenues have made an entry into market in recent years. This session aims at introducing such options to you which will widen your investment decision palette and help you make a diversified portfolio of yours going forward.

Session 10: Final presentations and test

As I said in the beginning, the module is presentation and case study driven. On last day of the module, you will have final presentations and the test based on the module's content.