



NISM-SERIES-X-A: INVESTMENT ADVISER (LEVEL 1) CERTIFICATION *(TRAINING)*

NISM Certification Examination - Mandated By SEBI



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NISMS X-A: Investment Adviser (Level 1) Certification (Training)



Training : Online Live Interactive Sessions(On Zoom)



Duration : 24 Hours+

Faculty : 20 years+ Industry Experience

Study Materials:

- ▲ Recorded sessions' videos
- ▲ PPTs (800+ slides) & PDFs
- ▲ 900+ MCQs with solution
- ▲ 45+ Case studies
- ▲ Career Guidance/Counseling
- ▲ Quick revision summary.

Assessment Structure by NISM:

- ▲ 90 MCQs of 1 mark each (90 marks)
- ▲ 9 Case Studies of 45 questions (60 marks)
- ▲ Duration: 3 hours.
- ▲ Passing score: 60%.
- ▲ Negative marking: 25% of the marks assigned to a question.
- ▲ Certificate Validity: 3 years



ICAPITAL ACADEMY & CORPORATE ADVISORY LLP  <https://icapitalacademy.com/>



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Disclaimer: The online training format, trainer, course duration, and study materials are subject to change without prior notice.



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Key highlights

**Online Live Interactive Training Sessions +
Online Self-paced**

Duration: 16+ hours

**Experienced faculty with 20+ years of
industry experience**

Curriculum Overview:

1. Learn personal financial planning, budgeting, debt management, and contingency strategies
2. Analyze financial positions to guide client decisions effectively
3. Understand India's financial markets, regulatory frameworks, and key institutions
4. Explore investment options like equities, bonds, derivatives, and alternative assets
5. Assess managed portfolios including mutual funds, PMS, and AIFs for suitability and compliance
6. Gain expertise in portfolio construction, risk-return analysis, and performance tracking
7. Master operational processes, legal compliance, ethical practices, and grievance redress
8. Build a strong foundation to navigate investment strategies and market regulations confidently

STUDY MATERIALS:

1. Recording available of online live sessions (for 90 days)
2. PPTs (700+ slides), PDFs & Excel spreadsheets.
3. 800+ MCQs with explanation
4. Quick revision summary notes.
5. Career Guidance/Counseling



ASSESSMENT DETAILS:

1. 100 Multiple Choice Questions: 1 mark each
2. Total Marks: 100
3. Duration: 2 Hours
4. Passing Score: 50%
5. Negative Marking: 25% of marks assigned per incorrect answer
6. Certificate Validity: 3 years

UPON SUCCESSFUL COMPLETION OF THE TRAINING, CANDIDATES WILL;

- 1. Understand Personal Financial Planning:** Learn the fundamentals of financial planning, time value of money, cash flow management, and debt management.
- 2. Grasp Indian Financial Markets:** Gain knowledge about the Indian financial ecosystem, market structure, and securities segments.
- 3. Comprehend Investment Products:** Understand various investment products, including equity, fixed income, derivatives, and managed portfolios.
- 4. Master Portfolio Construction:** Develop skills in constructing, monitoring, and evaluating portfolios.
- 5. Navigate Regulations and Ethics:** Acquire insights into the regulatory framework, compliance, ethical practices, and grievance redress mechanisms

Are you eligible ?

1. Associated Persons:

1. Individual investment advisers, principal officers, and professionals involved in investment advice under SEBI's regulations.

2. Interested Individuals:

1. Students (10th, 10+2, Undergraduates, Postgraduates) aspiring for careers in investment advisory.
2. Financial advisors and wealth managers seeking to enhance their expertise.
3. Professionals and individuals aiming to understand financial markets and advance their investment advisory knowledge.

ABOUT NISM:

- NISM is a public trust established in 2006 by SEBI to enhance standards in India's securities markets.
- It undertakes wide-ranging capacity-building activities for market participants.
- Programmes include residential PG courses, short-term training, and faculty development.
- NISM offers 29 SEBI-mandated and voluntary certifications through 250+ test centers nationwide.
- It manages six schools of excellence for specialized training..
- NISM is expanding globally to become a premier financial education hub.

ABOUT ICAPITAL ACADEMY:

- ❖ ICAPITAL Academy & Corporate Advisory LLP, established in October 2020, is a premier institution in financial education and advisory.
- ❖ Specializes in NISM certification preparation, capital markets training, and applied finance programs. Offers industry-relevant courses in Financial Modeling, Equity Research, Derivatives, Forex, Technical & Fundamental Analysis, and Mutual Funds.
- ❖ Provides self-paced, live online, and classroom-based learning formats for diverse learner needs. Delivers corporate training solutions focused on workforce upskilling, leadership development, and customized financial competency programs.
- ❖ Advisory services span financial research, personal finance, project finance, loan syndication, debt restructuring, and strategic corporate planning.
- ❖ Mission: To foster global financial excellence through quality education and professional empowerment.

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Empowering sustainable growth through knowledge and strategic edge.

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