

# NISM Series-X-B: Investment Adviser (Level 2) Certification (Training)



NISM Certification Examination - Mandated By SEBI



Scan for Google



Scan for Brochure



Scan for Register

# NISM Series-X-B: Investment Adviser (Level 2) Certification (Training)

**Training :** Online Live Interactive Sessions(On Zoom)

**Duration :** 24 Hours+

**Faculty :** 20 years+ Industry Experience



## Study Materials:

- Recording available of online live sessions (for 90 days)
- PPTs (700+ slides) & Pdfs
- 900+ MCQs with solution
- 30+ Case Studies with Solution
- Excel spreadsheets
- Quick revision summary.
- Career Guidance/Counseling

## Assessment Structure by NISM:

- 90 MCQs of 1 mark each (90 marks)
- 6 Case Studies of 30 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/>     

 admin@icapitalacademy.com, icapitalacademy20@gmail.com,  +91-9967813782, +91-9004574915,

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



Scan for  
Google



Scan for  
Register



Scan for  
Brochure

## *Key highlights:*

- ❖ Online Live Interactive sessions+ Online Self-paced
- ❖ Duration: 16+ hours
- ❖ Faculty: 20+ years of industry experience

# *Curriculum overview:*

- ❖ Understand life and non-life insurance fundamentals, needs analysis, and regulatory aspects
- ❖ Explore investing through insurance and global coverage in personal finance
- ❖ Master retirement planning, including corpus estimation, benefits, and accumulation products
- ❖ Build retirement portfolios and integrate philanthropy into financial goals
- ❖ Learn Indian taxation: income types, exemptions, deductions, capital gains, and investments
- ❖ Analyze tax implications in mergers, acquisitions, and special financial scenarios
- ❖ Grasp estate planning via wills, trusts, laws, and probate processes
- ❖ Examine behavioral finance biases, investor nudging, and market patterns
- ❖ Apply risk profiling, asset allocation, and real-world investment advisory techniques

# *Study Materials:*

- ❖ Recording available of online live sessions
- ❖ (for 90 days)
- ❖ PPTs (700+ slides), PDFs & Excel
- ❖ spreadsheets.
- ❖ 900+ MCQs with explanation
- ❖ 30+ Case studies with solution
- ❖ Quick revision summary notes.
- ❖ Career Guidance/Counseling

# *Assessment Details:*

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

# *Upon successful completion of the training, candidates will;*

- ❖ Understand life and non-life insurance fundamentals, needs analysis, and regulatory aspects
- ❖ Explore investing through insurance and global coverage in personal finance
- ❖ Master retirement planning, including corpus estimation, benefits, and accumulation products
- ❖ Build retirement portfolios and integrate philanthropy into financial goals
- ❖ Learn Indian taxation: income types, exemptions, deductions, capital gains, and investments
- ❖ Analyze tax implications in mergers, acquisitions, and special financial scenarios
- ❖ Grasp estate planning via wills, trusts, laws, and probate processes
- ❖ Examine behavioral finance biases, investor nudging, and market patterns
- ❖ Apply risk profiling, asset allocation, and real-world investment advisory techniques

*Are you eligible ?*

## Associated Persons:

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

## Interested Individuals:

- Students (10th, 10+2, Undergraduates, Postgraduates) aspiring for careers in investment advisory.
- Financial advisors and wealth managers seeking to enhance their expertise.
- 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.



Scan for **Google**



Scan for **Brochure**



Scan for **Register**

Do you want to  
know more ?

# ICAPITAL Academy & Corporate Advisory LLP

Empowering sustainable growth through knowledge and strategic edge.

(LLP IN : AAU-1006, PAN: AAIFI3809D, GSTIN: 27AAIFI3809D1ZJ)  <https://icapitalacademy.com/>

## ICAPITAL Group's Companies:

ICAPITAL Investment Managers Pvt. Limited

ICAPITAL Wealth and Portfolio Services Pvt. Limited

ICAPITAL Academy & Corporate Advisory LLP

ICAPITAL Wealth & Distribution Services

ICAPITAL Research & Financial Services

[www.icapitalgroup.in](http://www.icapitalgroup.in)

[www.icapitalindia.com/](http://www.icapitalindia.com/)

[www.icapitalacademy.com/](http://www.icapitalacademy.com/)

[www.icapitalwealth.org/](http://www.icapitalwealth.org/)



Scan for  
Google



Youtube  
Scanner



Whatsapp  
Scanner



Instagram  
Scanner



Twitter  
Scanner




Facebook  
Scanner



Linkedin  
Scanner

 +919967813782 / 02245008515

 [icapitalacademy20@gmail.com](mailto:icapitalacademy20@gmail.com)

 [training@icapitalacademy.com](mailto:training@icapitalacademy.com)

 <https://icapitalacademy.com/>