



NISM Series XIX-B: Alternative Investment Funds (Category III) Distributors (Training)



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NISMS XIX-B: Alternative Investment Funds (Cate.. III) Distributors (Training)

Training : Online Live Interactive Sessions(On Zoom)

Duration : 18 Hours+

Faculty : 20 Years+ Industry Experience

Study Materials:

- Self-paced learning (recordings) access for 90 days
- PPTs (800+ slides) & PDFs
- 900+ MCQs with solution
- 25+ Case studies with solution
- Excel spreadsheets
- Career guidance/Counseling

Assessment Structure by NISM:

- 5 Case Studies of 20 questions (20 marks)
- Duration: 2 hours.
- Passing score: 60%.

Negative marking: 10% of the marks assigned to a question.

Certificate Validity: 3 years



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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 sessions+ Online Self-paced
- ❖ Duration: 18+ hours
- ❖ Faculty: 20+ years of industry
- ❖ experience

Curriculum overview:

- Understand alternative investments, historical context, and portfolio role
- Examine growth, features, and investor suitability of Category III AIFs in India
- Learn characteristics of Category III AIFs and their risk management role
- Explore fund structures and roles of external service providers
- Study SEBI regulations, compliance norms, and investor accreditation
- Understand fee models, fund performance metrics, and benchmarking tools
- Master investment strategies like equity-market and arbitrage, and due diligence
- Learn NAV and asset valuation, plus role of registered valuers
- Understand taxation of Category III AIFs, including IFSC impact
- Adopt distributor best practices, ethical conduct, and client servicing

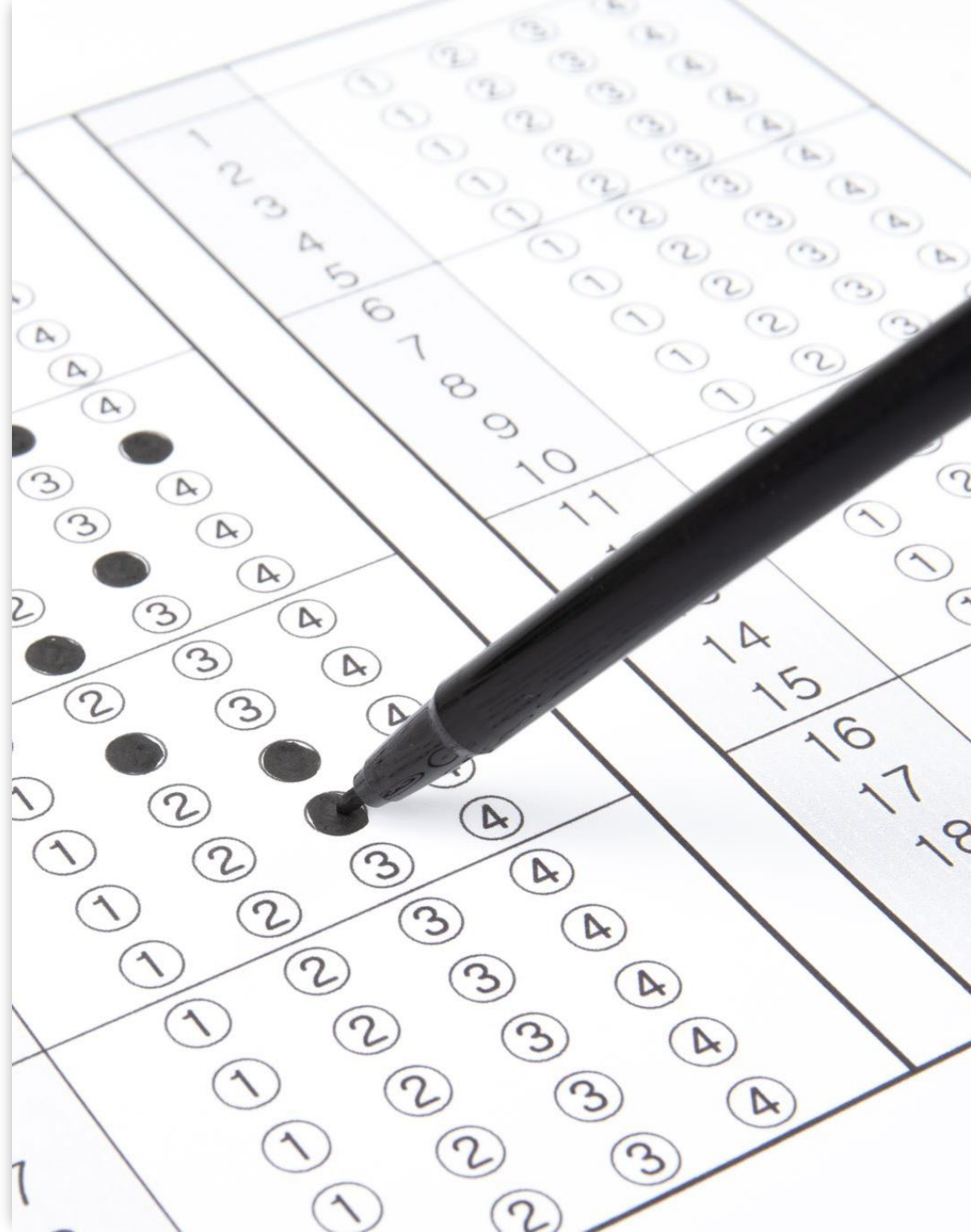
Study Materials:

- Recording available of online live sessions (for 90 days)
- PPTs (800+ slides), PDFs & Excel spreadsheets.
- 900+ MCQs with explanation
- 25+ Case studies with solution
- Quick revision summary notes.
- Career Guidance/Counseling



Assessment Details:

- 100 Multiple Choice Questions
- 80 multiple-choice questions (1 mark each).
- 5 case-based questions, each with 4 multiple-choice sub-questions (1 mark each).
- Total Marks: 100
- Duration: 2 Hours
- Passing Score: 60%
- Negative Marking: 25% of marks assigned per incorrect answer
- Certificate Validity: 3 years



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

Understand Alternative Investments:

Learn fundamentals of alternative asset classes and Category III AIF market in India.

- Comprehend the Ecosystem & Risk Management Role:
Study fund structures, service providers, and risk management via Category III AIFs.
- Master Performance Evaluation & Valuation:
Gain expertise in performance metrics, benchmarking, and NAV computation.
- Understand Taxation & Regulatory Frameworks:
Explore SEBI regulations, compliance norms, and taxation principles.
- Enhance Distribution & Client Servicing Skills:
Learn best practices for distributors, including ethics and client confidentiality.
- Assessment Details:
- Format: 100 MCQs
 - 80 standard MCQs (1 mark each)
 - 5 case-based questions with 4 MCQs each (1 mark each)
- Total Marks: 100
- Duration: 2 hours
- Passing Score: 60%
- Negative Marking: 25% per incorrect answer
- Certificate Validity: 3 years

Are you eligible ?

Associated Professionals:

- Distributors and placement agents working in the Category III AIF domain in India.
- Employees of SEBI-registered entities involved in the sales, distribution, or compliance of Category III AIFs.
- Professionals managing fund structuring, investor servicing, or risk management for Category III AIFs.

Aspiring Individuals:

- Candidates pursuing 10th, 12th, undergraduate, or postgraduate studies interested in alternative investments and financial markets.
- Wealth managers, financial advisors, and portfolio managers seeking specialization in Category III AIF distribution.
- Individuals aiming to enhance their expertise in investment strategies, fund valuation, and client-focused distribution services.

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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