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NISM-Series-XXI-B: Portfolio Managers Certification *(Training)*

NISM Certification Examination - Mandated By SEBI

NISM-Series-XXI-B: Portfolio Managers Certification (Training)

Training : Online Live Interactive Sessions(On Zoom)

Duration : 30 Hours+

Faculty : 20 years+ Industry Experience

Online

Study Materials

- Self-Paced learning (recordings) access for 90 days
- PPTs (1000+ slides) & PDFs
- 1100+ MCQs with solution
- 25+ Case Studies with Explanation
- Excel spreadsheets
- Quick revision summary notes.
- Career guidance/Counseling

Assessment Structure by NISM

- 90 MCQs of 1 mark each
- 6 Case Studies (each case with 5 questions of 2 mark each)
- Duration: 3 hours.
- Passing score: 60%.
- Negative marking: 25% of the marks assigned to a question.
- Certificate Validity: 3 years

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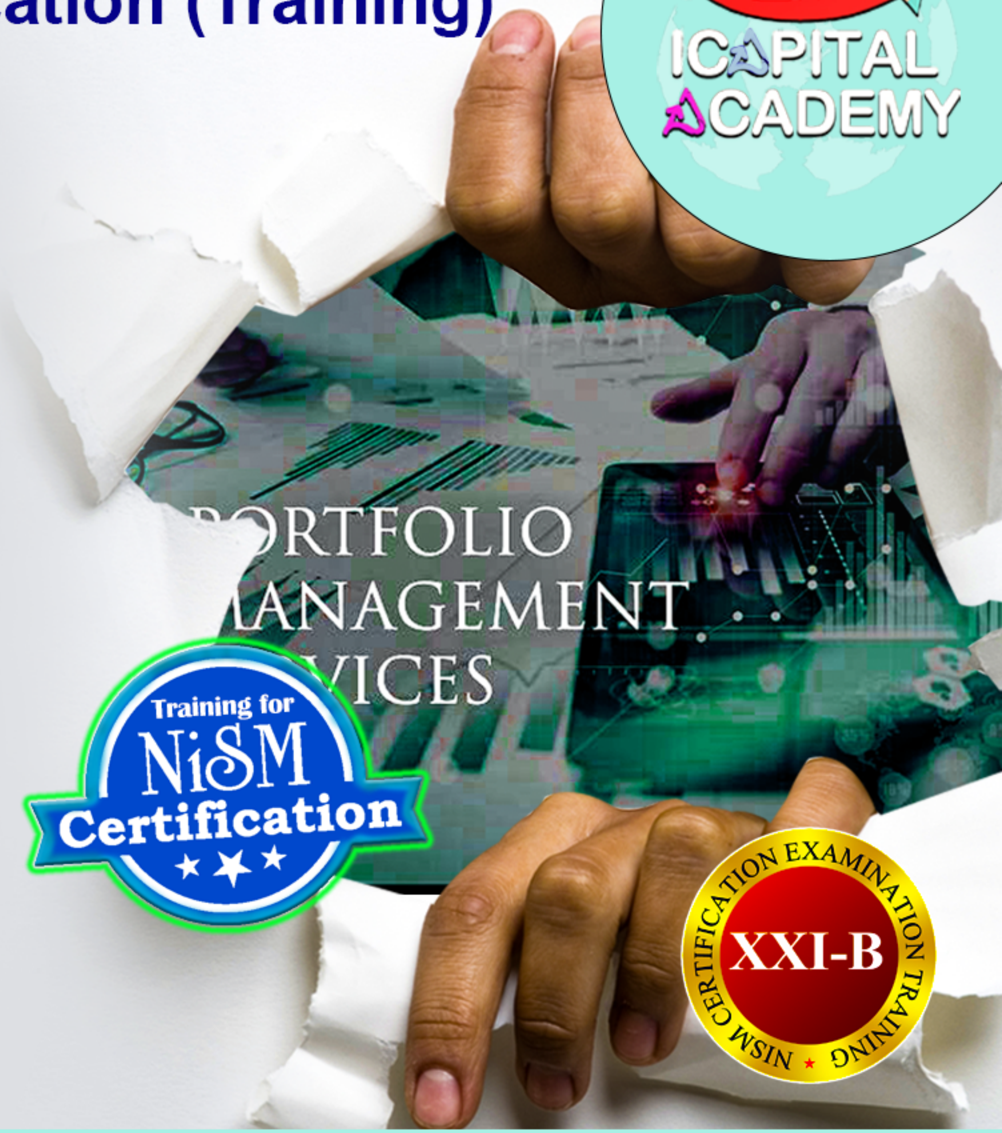

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Key Highlights:

Online Live Interactive sessions+ Online Self-paced

Duration: 30+ hours

Faculty: 20+ years of industry experience

Curriculum overview:

- **Investment Landscape**: Understand fundamentals, objectives, channels, and difference between investment and speculation.
- **Securities Markets**: Learn about primary/secondary markets, participants, and their roles.
- **Financial Instruments**: Study equities, bonds, derivatives, and mutual funds—valuation, risks, and benefits.
- **Portfolio Managers**: Know roles, PMS types, and firm structures.
- **PMS Operations**: Understand onboarding, disclosures, grievance redressal, and fee structures.
- **Portfolio Process**: Master asset allocation, rebalancing, strategic vs. tactical approaches.
- **Tax & Regulation**: Learn SEBI norms, taxation, governance, and ethics.
- **Advanced Concepts**: Explore behavioral finance, market theories, and indices.
- **Strategies**: Study active/passive equity, smart beta, fixed income, and derivatives.
- **Risk Management**: Understand risk types, measurement, and mitigation.
- **Performance**: Analyze risk-return, benchmarking, GIPS, and attribution.
- **Rebalancing**: Learn buy-and-hold, constant mix, and CPPI strategies.

Study Materials:

- Recording available of online live
- sessions (for 90 days)
- PPTs (1000+ slides), PDFs &
- Excel spreadsheets.
- 1100+ MCQs with explanation
- 25+ Case studies with explanation
- Quick revision summary notes.
- Career Guidance/Counseling

Assessment Details:

- 100 Multiple Choice Questions
- 90 multiple-choice questions of 1 mark each (90 marks).
- 6 case-based questions each case with 5 questions of 2 marks each (60 marks).
- Total Marks: 150
- Duration: 3 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;

- **Gain Proficiency in Investment Basics:**
  Learn the fundamentals of investments, securities markets, and diverse financial instruments like equities, bonds, mutual funds, and derivatives.
- **Master Advanced Financial Concepts:**
  Understand indices, market efficiency, behavioral finance, modern portfolio theory, and capital market theory to optimize portfolio strategies.
- **Comprehend Portfolio Management Services:**
  Develop expertise in the operational aspects of PMS, including client onboarding, portfolio construction, performance evaluation, and risk-return trade-offs.
- **Understand Taxation and Regulatory Frameworks:**
  Gain insights into taxation policies, SEBI regulations, governance, and ethical practices applicable to portfolio managers and their teams.
- **Learn Equity and Fixed Income Portfolio Strategies:**
  Study active and passive management techniques, derivative applications, and global investment strategies for portfolio enhancement and risk mitigation.

Are you eligible ?

Associated Professionals:

- Principal officers and employees of PMS firms involved in portfolio management and compliance activities.
- Professionals responsible for investment strategy development, risk management, and portfolio performance evaluation.
- SEBI-registered entity staff managing PMS operations and investor relations.

✓ **Aspiring Individuals:**

- Students pursuing undergraduate or postgraduate degrees in finance, economics, or investment management.
- Financial analysts, wealth managers, and investment advisors aiming to specialize in portfolio management.
- Individuals seeking expertise in taxation, regulatory compliance, and advanced portfolio strategies.

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.0000

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Empowering sustainable growth through knowledge and strategic edge.

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