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NISM-Series-XXI-A: Portfolio Management Services (PMS) Distributors Certification *(Training)*

NISM Certification Examination - Mandated By SEBI

NISM-Series-XXI-A: Portfolio Management Services (PMS) Distributors Certification

Training : Online Live Interactive Sessions(On Zoom)

Duration : 21 Hours+

Faculty : 20+ years Industry Experience



Study Materials:

- Recording available of online live sessions (for 90 days)
- PPTs (700+ slides) & PDFs
- Excel spreadsheet.
- 1000+ MCQs & with explanation
- Quick revision summary note
- Career Guidance/Counseling

Assessment Structure by NISM:

- 80 MCQs of 1 mark each (80 marks)
- 3 Case Studies of 15 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.

Key highlights:

Online Live Interactive sessions+ Online Self-paced

Duration: 21+ hours

Faculty: 20+ years of industry experience

Curriculum overview:

- **Investment Landscape:** Understand investment goals, channels, and difference between investment vs. speculation.
- **Securities Markets:** Learn market structure, participants, and primary vs. secondary markets.
- **Stocks:** Explore equity risks/rewards, stock selection, and corporate governance.
- **Fixed Income:** Analyze bonds, valuation, features, and price sensitivity.
- **Derivatives:** Study purpose, types, and mechanics of futures/options.
- **Mutual Funds:** Know operations, performance metrics, SEBI rules, and benefits.
- **Portfolio Managers:** Learn roles, structures, and PMS types in India.
- **Operations:** Understand onboarding, disclosures, costs, grievance redressal, reporting.
- **Portfolio Process:** Study asset allocation, rebalancing, and asset correlation.
- **Performance:** Learn risk-return, benchmarks, peer review, GIPS.
- **Taxation:** Understand PMS taxation and Section 9A.
- **Regulation:** Grasp SEBI norms, governance, and ethics.

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- sessions (for 90 days)
- PPTs (700+ slides), PDFs & Excel spreadsheets.
- 1000+ MCQs with explanation
- Quick revision summary notes.
- Career Guidance/Counseling

Assessment Details:

- 100 Multiple Choice Questions of 1
- mark each (100 marks).
- Total Marks: 100
- Duration: 2 Hours
- Passing Score: 60%
- Negative Marking: 10% of marks
- assigned per incorrect answer
- Certificate Validity: 3 years

Upon successful completion of the training, candidates will;

- **Develop a Strong Foundation in Investments:**
Gain an understanding of the basic concepts of investments, securities markets, and key financial instruments, including stocks, bonds, mutual funds, and derivatives.
- **Master Portfolio Management Services (PMS):**
Learn about the operational aspects of PMS, the responsibilities of portfolio managers, and the process of managing and evaluating investment portfolios to meet diverse client needs.
- **Understand Risk and Performance Measurement:**
Acquire skills in asset allocation, risk-return trade-offs, performance benchmarking, and advanced evaluation metrics to assess the effectiveness of portfolio strategies.
- **Gain Insights into Taxation and Regulations:**
Become familiar with taxation aspects related to portfolio management, along with regulatory frameworks, ethical standards, and governance requirements for PMS distributors and managers.

Are you eligible ?

- The NISM-Series-XXI-A: Portfolio Management Services (PMS) Distributors Certification Examination is suitable for:
 - ✓ **Associated Professionals:**
 - Distributors and advisors working with portfolio management services.
 - Employees of SEBI-registered entities involved in PMS distribution and compliance activities.
 - Professionals responsible for client onboarding, fund evaluation, and investor portfolio administration in the PMS domain.
 - ✓ **Aspiring Individuals:**
 - Undergraduate or postgraduate students with an interest in portfolio management and financial markets.
 - Wealth managers, financial advisors, and portfolio analysts seeking to enhance their expertise in PMS distribution.
 - Professionals aiming to deepen their understanding of taxation, regulatory compliance, and performance evaluation in the portfolio management industry.

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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