CERTIFICATE COURSE IN EQUITY PORTFOLIO MANAGEMENT

NSE Academy,

in collaboration with ALPHABETA,

brings to you the most advanced data visualization and immersive learning platform

NSE ACADEMY

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Overview:

Why this course is important?

The Indian Mutual Fund & Wealth Management industry is bound to grow manifold in the coming years. This course gives an opportunity to learn about the portfolio management strategies, which are adopted by Fund managers. At the end of the course, you will be able to confidently talk investments, be ready to be an analyst, and eventually manage stock portfolios.

Equity Portfolio Management course provides a practical introduction to equity portfolio management. Using an **interactive app**, the learning is driven by simulation techniques that allow you to visualize stocks, learn concepts, make decisions, and create trades like a portfolio manager. You will start with simple concepts and graduate progressively to more complex strategies using both statistical and fundamental methods.

Everything you will learn in this course is grounded in strong academic research but is also used by leading real-world portfolio managers. The concepts in this course serve as the basis for the management of hundreds of billions of rupees of assets daily.

Programme Highlights:

- Learn on the Go
- Game based pedagogy
- Manage portfolios in real time
- Advanced trading strategies
- Simulate and back-test strategies with real market data, for past 6 years
- Learn rigorous academic and professional research content in a visual exploration environment
- Compete globally with your peers to establish your track record
- Joint certification from NSE Academy Limited – the wholly owned subsidiary of NSE and New York head quartered, ALPHABETA Inc
- Available on iOS, Android, MAC OS X, Windows 10+

Course Prerequisites:

Ideally, some knowledge of basic finance and accounting concepts is desirable, but this is not mandatory. We do not believe that learning is necessarily a linear process, so you can always fall back and learn concepts as and when you encounter them. All you will require are basic mathematical and reasoning skills at a high school level along with a healthy mix of curiosity and enthusiasm without fear of failing.

Our motto is "Try, fail, try again, learn, validate, and apply"

Course Content:

You will study the following topics, interweaved with lab experiments and simulations. There will be no theoretical component in this course for which you will not see a practical application.

- Introduction to stock markets
- Review of finance and accounting concepts
- Investing objectives and styles
    a. Fundamental vs. Statistical Approaches
    b. Investment horizons
    c. Systematic approaches – alpha, beta, passive beta
- Introduction to systematic approaches and market phenomena
    a. Use past **Momentum** to predict future returns
    b. Identify similar stocks and profit using Pairs Trading
    c. **Value Investing** to discern underpriced and overpriced stocks
    d. Use **Accruals** and **Cashflow** to differentiate stocks based on earnings quality
- Underlying theories in portfolio management
    a. Capital asset pricing model (CAPM)
    b. Risk return tradeoff
    c. Statistical methods – regression, correlation, law of large numbers
    d. Trading techniques – short selling, basket trading
    e. Fundamental analysis – market and book value, earnings, accruals
    f. Ratio analysis for value investing – monotonic functions, ratio selection
    g. Risk management – diversification, hedging, market and sector neutral approaches
    h. Judgment and heuristics in markets and trading

Programme Format:

- Concepts are grouped as:
  - a. Analytical - based on finance theory
  - b. Quantitative - based on math
  - c. Heuristic - based on best practice acquired through repetition
- In each session, you will learn one new concept in each category and apply them in the corresponding lab experiment. As a learner, you will have access to a video lecture, a lab experiment (simulation), a presentation supplement and a quiz. Multiple sessions will constitute a module
- At the end of each module, you will have an assignment that will be heavily based on the lab experiments, simulations and your reading of the academic papers for additional credit
- In many cases, you will be asked to perform the lab experiment first, then learn what you did in the lecture and repeat the lab experiment again

While lectures and presentation materials are provided, they are merely the scaffolding to the real learning that will come from doing things practically and interactively.

- There are two course options:
  - a. **Option 1:** Discussions will be facilitated in a classroom based workshop (in Mumbai), by Global Portfolio Managers with Wall Street experience
  - b. **Option 2:** Online mentored programme with a weekly connect for discussion and resolution of queries

Duration: 30 hours

Payment Mode:

Payment can be done by way of NEFT/RTGS/IMPS as per the details given below:

NSE ACADEMY LTD

HDFC BANK

Account No. : 00600340081024

MICR CODE : 400240015

IFSC CODE : HDFC0000060

Branch : FORT

OR

by way of demand draft in the name of 'NSE Academy Limited' payable at Mumbai.

Faculty Profile :

Dr. P. Harish Kumar, Ph.D., CFA, Professor (Instructor, Offline Classroom Program)

Dr. Kumar has worked in Wall Street for over 15 years as an investment management professional, managing US $10 billion in global equities and alternative investment strategies. Most recently, he was the Head of Growth Equities and lead Portfolio Manager at Madison Square Investors. Dr. Kumar received a Ph.D. and M.Phil. from the Graduate School of Business at Columbia University, New York, a Master's degree from the University of Colorado at Boulder, and a Bachelor's degree from Birla Institute of Technology and Science in Pilani, India. He is currently a visiting professor of finance at the Amrita School of Business, Amrita Vishwa Vidyapeetham in Coimbatore, India.

Dr. Vikram Kuriyan, CFA, Professor (Mentor, Online Programme)

Dr. Kuriyan is Director of the Investment Laboratory and a member of the faculty at the Indian School of Business. Previously, he was Chairman of the Global Asset Allocation Committee and global head of Quantitative Strategies at Bank of America's asset management division, managing over $30 billion of client assets. Dr. Kuriyan earned his Ph.D. and Master's degree in Engineering Science at Harvard University and also spent a year in the M.B.A program at the Harvard Business School. He has a B.S. in Electrical Engineering from the Massachusetts Institute of Technology. Dr. Kuriyan has been an advisor and active contributor through video lectures within ALPHABETA Guide.

Press Release links :

The Times of India

Hindu Business Line

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