

Certificate Course in Equity Portfolio Management



Course Objective

Spreading an opportunity to learn about the portfolio management strategies which are adopted by fund managers along with confident knowledge on investments skills to

have a directional journey towards specific profiles such as an analysts, portfolio managers and etc.

About the Course

This 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.

Features

- 6 weeks online programme
- Concepts are grouped as Analytical (based on finance theory), Quantitative (based on math) and Heuristic (based on best practice acquired through repetition)
- In each session, you will learn one new concept in each category and shall 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 on the ALPHABETA App.

Benefits

- 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 headquartered, ALPHABETA Inc
- Available on iOS, Android, MAC OS X, Windows 10

Curriculum/ Course Content

You will study the following topics, interweaved with lab experiments and simulations.

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

Eligibility

Should have passed HSC or equivalent from a recognized board of studies

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

Profile of The Faculty

Kirthi Ramakrishnan

Based in NYC, Kirthi co-founded ALPHABETA and sets the strategic vision for the platform. With over 20 years in financial engineering and technology, he has developed the original visual taxonomy, the pedagogical methods, and the financial modelling within the platform. He is a B.Engg from Anna University and an MBA from Tulane University.

Dr. Harish Kumar

Wall Street Investment manager with 15 years experience, Managed assets worth \$10 billion in global equities and alternative equity investment strategies at Madison Square, ING Investment Management, and Aeltus Investment Management, Dr. Kumar received a Ph.D. and M.Phil. from the Graduate School of Business at Columbia University, a Masters from the University of Colorado at Boulder, and a Bachelor's degree from Birla Institute of Technology and Science in Pilani, India in Mechanical Engineering. Dr. Kumar is a CFA charter holder.

Rajesh Madhavan

An adjunct professor at NMIMS –Bangalore and a visiting Professor at the Indian Institute of Management – Rohtak and other top tier B-Schools in India in the area of Finance. In his consulting role, he has been involved in potential acquisition ideas, due diligence, valuation and structuring involving venture capital and private equity investments in diverse sectors

Dr. Vikram Kuriyan (In-app instructions)

An active contributor through video lectures within ALPHABETA Guide. He is Chairman of GWA Investment Advisors and the Director of the Investments Laboratory at the Indian School of Business, Hyderabad. He has spent over 25 years in quantitative research at Bank of America, Columbia Asset Management, Merrill Lynch. He has a BS from MIT and a PhD from Harvard.

Testimonials

The Equity Portfolio Management programme - An online programme with continuous assistance throughout. The best part about the programme was the simulation based application which made the entire course practical and hands on. The expert and mentor session over the weekend made sure that the students were proactive and were not taking a backseat in their learning approach. Also, the faculty was very warm and open to answering as many questions that we had which made me feel very comfortable in coming forward with my queries. Overall, a hands-on course for a period of 2 months to help you get started with understanding the nuances of the stock market.

~Sakina Olia (HR professional with a Masters in Psychology)

"CEPM course has given me a different perspective of equity market and changed the way I manage my investment portfolio's Alpha and Beta. I would recommend this course as a starting point to every investor and future portfolio manager because of its well-designed content, investment strategies, weekly mentoring session and interactive lab .Course experience is designed and managed by an excellent professional team."

~Arindam Mullick (NRI Investor and Oil and Gas professional)

Alphabeta is the new "killer app" which gave me platform to explore and hone my trading skills through simulations, helping me to make more informative and thought through decisions in real market. It's user friendly

interface is a no risk way to learn about market trading strategies.

~Diskha Jain (M.A in Economic (Hons.) with distinction)

Overall it is an excellent course for anyone to understand about the complexities of the share market in a simple, methodical and systematic manner. I wish, if ALPHABETA can tie up with few brokers or firms, to enable the students, who completes the course to start trading and experience the real market, would be simply great! My best wishes for the ALPHABETA team for putting all the hard work and efforts to make this course a great success! Keep it up!

~S. Manikantan (CA)

This course has reshaped my career from

Accounting to Finance. The professors gave us the practical knowledge along with all the concepts of the Portfolio Management Strategies. The Alphabeta app is the best part of the course where you get to learn and perform the simulations on the real market data. It's a great experience to start your career in finance.

I'm a student of ICAI & I'm also pursuing Chartered Financial Analysts course from CFA Institute.

~Sarvagya Kaushik (CA student and CFA Aspirant)

About the company

ALPHABETA was launched in 2014 by TOPXIGHT LABS (www.topxight.com), a New York based software lab and incubation studio, with New York based Valmiki Capital Management as the founding investor.

ALPHABETA (www.alphabeta.io) is the first platform to use true visual collaboration to bring together students, practitioners and consumers in financial markets through unique

immersive user experiences with a common vocabulary.

The ALPHABETA Guide platform is designed to educate finance students in Investment strategies and Portfolio Management. Using a combination of real world situations, flipped classroom methodology we provide an intuitive and immersive information visualization platform built on a game engine

Workshop Details

CERTIFICATE COURSE IN EQUITY PORTFOLIO MANAGEMENT

Venue/where would the course be conducted : 6 week online programme.
Live sessions will be conducted over video conferencing

HOW TO ENROLL

Register through www.nseindia.com by clicking on the link
<https://www.ncfm-india.com/ORE/OREregisterCandidate.jsp>

Make the payment of Total Fees (INR 23,600/-) referring payment details by any payment mode.

PAYMENT MODE AND DETAILS

Payment can be done either by NEFT/RTGS or Demand Draft or Payment Link
(Debit Card / Credit Card / Net Banking)

1) Payment details for internet banking using NEFT/RTGS as per details given below.

NSE ACADEMY LTD
HDFC BANK
ACCOUNT NO : 00600340081024
MICR CODE : 400240015
IFSC CODE : HDFC0000060
BRANCH : FORT

2) In case of Demand Draft, please issue a Demand Draft in favour of
'NSE ACADEMY LIMITED' payable at Mumbai.

3) In case of Payment Link, please send your name, mobile number and email address at
guptap@nse.co.in or ksubudhi@nse.co.in to generate the payment link.

FEE STRUCTURE

INR 20,000/- + INR 3,600/- (GST 18%) = INR 23,600/ -

REFUND POLICY

Registration fees once paid is non-refundable under any circumstances	
Refund request received two workings days or 48 hours prior to the date of commencement of course or launch date of course or first lecture/class, whichever is earlier	90% of the course fees shall be refunded
Refund request post 48 hours prior to the date of commencement of course or launch date of course or first lecture/class, whichever is earlier	Zero refund

FOR ANY FURTHER QUERIES, PLEASE CONTACT

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May prosperity always bloom



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