

Mutual Funds Basics

Developed in partnership with AIIM EduSys Private Limited (AIIM)



Course Details:

Topics: 4
Learning Hours: 07:05
Contents: Interactive
Supplements: -
Type: Self-Paced (30, 45 & 60 Days)
Mentor Partner: AIIM EduSys Private Limited (AIIM)

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Mutual Fund Basics (Wealth Management Series)

About Mutual Funds Basic Course

This is a basic level course on Mutual Funds to help you get a fair understanding of mutual funds as an investment product as well as the mutual fund business.

The course explains how mutual funds are smartly structured and logically classified for them to be found useful by a wide variety of investors. It also tells us how mutual funds serve as an indirect tool of investments wherein professional fund managers bring in their expertise to make investments for lakhs of mutual fund unit holders. One is able to see all the benefits of making investments through the mutual fund route.

The course also talks about the many options and plans available to investors who can choose what suits them the best based on the category of investor they may belong to.



Just so that a complete picture is made available, the documentation, know-your-customer (KYC) and some more relevant operational aspects of mutual funds have additionally been covered in this course.

What You Get

The self-paced Mutual Fund Basics Course consists of 4 highly interactive topics and is available for 30, 45 or 60-days. Self-paced course includes -

- ✓ Courseware developed [AIIM](#), a leading institution in investments & banking education
- ✓ 4 self-paced interactive topics based on the AIIM's classroom courses
- ✓ Additional practice questions through-out the course

Who Should Purchase this Course?

If you meet any one or more of the following criteria, then you are the right candidate to purchase this course. In particular, you are:

- o A working professional who is currently employed in the Banking, Financial Services & Insurance (BFSI) industry.
- o A fresh MBA/fresh graduate/degree-college student who aspires to make a career in the financial services industry.
- o A distributor of various financial services products.
- o A potential investor in mutual funds.
- o A retired person, home-maker who wishes to enhance his/her knowledge in this particular domain area.

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Course Topics

#	Topic Name	Description
1	Mutual Funds Overview	This module helps you understand what a mutual fund actually is. The structure of mutual funds and how they work is explained. The concept of Net Asset Value (NAV) is also covered in this module.
2	Classification of Mutual Funds	In this module, various kinds of methods of classification of mutual funds are explained. This provides a wide array of choices for different categories of investors to appropriately fit their investment objectives.
3	Options, Plans & Benefits of Mutual Funds	In this module, the high degree of flexibility of mutual funds is explained which is brought about by virtue of the many options and plans and facilities like switch, trigger etc. all of which are explained.
4	Documentation, KYC and Operational aspects of Mutual Funds	This module pertains to application forms, regulatory requirements for investors, new fund offer (NFO), purchases and redemptions, statement of account and many other related sub topics to give a complete overall picture on mutual funds.



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