

Semester Lecture Plan

Name of the College: Government College of Arts Science and Commerce, Sanquelim Goa		
Name of Faculty: Yakshita Kiran Vengurlekar	Subject: Mutual Fund Agent -I	
Paper code: VOS 306	Program/Course: S.Y. B.Voc	Division:
Academic year: 2024 - 2025	Semester: III	Total Lectures: 60
Course Objectives: Course Objectives: At the end of the program, the learner will be able to apply proper techniques to conduct market research on mutual funds and sell the products, employ proper procedure to perform aftersales activities, employ suitable practices to maintain data integrity and data privacy, dramatize how to communicate effectively with guests, colleagues, and superiors to achieve a smooth workflow, apply health, hygiene, and safety practices at the workplace and use resources at the workplace optimally.		
Course Outcome: At the end of the program, the learner will be able to <ul style="list-style-type: none"> • Apply proper techniques to conduct market research on mutual funds and sell the products • Employ proper procedure to perform after-sales activities • Employ suitable practices to maintain data integrity and data privacy • Dramatize how to communicate effectively with guests, colleagues, and superiors to achieve a smooth workflow • Use resources at the workplace optimally 		
Student Learning Outcome: After completion of the course, the students will be equipped with the following <ul style="list-style-type: none"> • Utilize appropriate methods for performing market research on mutual funds to effectively promote and sell the products. • Follow correct protocol for conducting post-sale tasks. • Use appropriate methods to uphold the integrity and confidentiality of data. • Demonstrate the art of effective communication with guests, colleagues, and superiors to ensure a seamless workflow. • Utilize workplace resources efficiently. 		

Month	Lectures From:	To:	No. of lectures allotted	Topic, Subtopic to be covered	Exercises/ Assignments	ICT Tools	Reference books
July 2024	01/07/24	31/07/24	18	<p>Unit I: Introduction to Mutual Funds Discuss the objectives and benefits of the Skill India Mission • Describe the scope of Banking Industry and its sub-sectors • Discuss job role and opportunities for a Mutual Fund Distributor • List the basic terminologies used in banking services and Mutual Funds. Meaning of mutual funds and their advantages, different types of mutual funds: classification table., limitations of mutual funds. Perceptions of an individual investor: Comparison of mutual fund investment with bank deposits and direct equity investment. Advantages of mutual funds viz. professional management, choice of schemes,</p> <p>Unit II: Mutual Fund Schemes Different types of Mutual Fund Scheme (Equity schemes, Debt schemes, Hybrid schemes, Solution Oriented schemes, other schemes)</p>		Interactive panels, Power Point Presentations, PDF's, Google classrooms	Mutual Fund Distributor - NISM
August 2024	01/08/24	31/08/24	17	<p>Unit II: Mutual Fund Schemes Different types of Mutual Fund Scheme (Equity schemes, Debt schemes, Hybrid schemes, Solution Oriented schemes, other schemes)</p> <p>Unit III: Marketing of Mutual Funds Describe the standard procedure of conducting risk profiling and identifying the financial requirements and goals of the customer</p>	Question and answers, problem solving, quiz, Case Studies, tests	Interactive panels, Power Point Presentations, PDF's, Google classrooms	Mutual Fund Distributor - NISM

September 2024	01/09/24	30/09/24	13	<p>Unit III: Marketing of Mutual Funds</p> <ul style="list-style-type: none"> Describe the methods of analysing mutual fund market to identify the top performing funds, customer interests, trends, etc. <p>Studying the features of identified top mutual funds and factors influencing them</p> <p>State the significance of gathering and analyzing the latest insights for regular stock market updates</p> <p>Unit IV: After sales Services</p> <ul style="list-style-type: none"> State the significance of maintaining relationship with customers, and updating the customer on mutual fund and responding to their queries and concerns regarding the mutual fund schemes held by them 	Question and answers, problem solving, quiz, Case Studies, tests	Interactive panels, Power Point Presentations, PDF's, Google classrooms	
October 2024	1/10/2024	22/10/2024	12	<p>Unit IV: After sales Services</p> <ul style="list-style-type: none"> Elaborate the risk-assessment methods for the customer portfolio in the changing market scenario <p>Revision</p>	Question and answers, problem solving, quiz, Case Studies, tests		
	Total Lectures		60				

Component	Max Marks
ISA 1	
ISA 2	
Practical	
Project	
Semester End Exam	100 (Skill based assessment)