

Lecture Plan

Name of the College: Government College of Arts, Science and Commerce. Sanquelim - Goa

Name of Faculty: Ms. Sheetal Mandrekar

Subject: Mutual Fund Distributor - III

Paper code: VOS308

Program: S.Y.B.Voc (BFSI)

Division:

Academic year: 2024-2025

Semester: III

Total Lectures: 45

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 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, 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:
- 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
- Apply health, hygiene, and safety practices at the workplace
- Use resources at the workplace optimally

Student Learning Outcome:

- 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 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
- Apply health, hygiene, and safety practices at the workplace
- Use resources at the workplace optimally

Month	Lecture From	Lecture To	No. of lectures allotted	Topic, Subtopic to be covered	Exercise/ Assignment	ICT Tools	Reference books
JUNE 2024	28/06/2024	29/06/2024		Unit II - Marketing of Mutual Fund	Test	Smart Board, Power Point Presentation	Mutual Distributors, Certification Fund NISM
JULY 2024	01/07/2024	06/07/2024	08	Role play a situation to respond to customers' queries and concerns regarding mutual fund schemes, assist them in estimating the risks and factors involved in their current portfolio and advise them to revisit and restructure their existing portfolio according to their new financial goals	Test	Smart Board, Power Point Presentation	Mutual Distributors, Certification Fund NISM
	08/07/2024	13/07/2024		Unit III - After Sales Services			
	15/07/2024	20/07/2024		Net Asset Value Calculation of NAV,			
	22/07/2024	27/07/2024		Calculation of Portfolio Risk and Return.			
	29/07/2024	31/07/2024		accounting, valuation and tax implications.			
AUGUST 2024	01/08/2024	03/08/2024	08	MEASURING FUND PERFORMANCE Measuring fund performance	Test	Smart Board, Power Point Presentation	Mutual Distributors, Certification Fund NISM
	05/08/2024	10/08/2024		9.1 Benchmarking and			
	12/08/2024	18/08/2024		9.2 Quantitative measures used for analysis			
	19/08/2024	24/08/2024		Perform After-Sales Activities - Role play a situation to assist the customer in completing the process of top-up/switch/redemption of mutual fund schemes			
	26/08/2024	31/08/2024		Perform After-Sales Activities - Role play a situation to assist the customer in completing the process of top-up/switch/redemption of mutual fund schemes			
SEPTEMBER 2024	02/09/2024	05/09/2024	08	Dramatize on how to provide assistance to the customers in completing the procedure for lien marking on the mutual fund units	Test		

			and aid them in updating/changing the details for nominee, bank, address, etc.			
	13/09/2024	14/09/2024	Dramatize on how to provide assistance to the customers in completing the procedure for lien marking on the mutual fund units and aid them in updating/changing the details for nominee, bank, address, etc.			
	17/09/2024	21/09/2024	Dramatize on how to provide assistance to the customers in completing the procedure for lien marking on the mutual fund units and aid them in updating/changing the details for nominee, bank, address, etc.			
	23/09/2024	28/09/2024	Dramatize on how to provide assistance to the customers in completing the procedure for lien marking on the mutual fund units and aid them in updating/changing the details for nominee, bank, address, etc.			
	30/09/2024	30/09/2024	Dramatize on how to provide assistance to the customers in completing the procedure for lien marking on the mutual fund units and aid them in updating/changing the details for nominee, bank, address, etc.		Smart Board, Power Point Presentation	Mutual Distributors, Certification Fund NISM
	01/10/2024	05/10/2024	Employ proper practices to plan and execute regular engagement with customers for periodic review of customers' financial goals			
	07/10/2024	12/10/2024	Employ proper practices to plan and execute regular engagement with customers for periodic review of customers' financial goals			
	14/10/2024	19/10/2024	Employ proper practices to plan and execute regular engagement with customers for periodic review of customers' financial goals			
	21/10/2024	22/10/2024	Employ proper practices to plan and execute regular engagement with customers for periodic review of customers' financial goals			
OCTOBER 2024				06	Test	Smart Board, Power Point Presentation Mutual Distributors, Certification Fund NISM
TOTAL LECTURES		30				

Assessment Rubrics

Component	Max Marks
ISA 1	
ISA 2	
Practical	
Project	

Semester	
End Exam	100