

Investing in Mutual Funds in the Current Market Scenario

A Workshop

Programme Content

Introduction and Overview of Mutual Fund Industry

Current Financial Market Crisis – Implications to Indian Mutual Fund Industry

New Innovations in Fund Products

- ▲ Dynamic Asset allocation funds
- ▲ Gold Exchange-Traded Funds
- ▲ Capital Protection fund
- ▲ Special Situations Fund
- ▲ Fund of Funds

New Product development

- ▲ Conceptualization
- ▲ Market survey
- ▲ Regulatory compliance check

Role of Distributors

- ▲ Distribution channels
- ▲ Appointment of agents

Risk Management

- ▲ Funds Management
- ▲ Sales Process
- ▲ Investor services

Compliance and Taxation Issues

- ▲ Reporting requirements
- ▲ Taxation of mutual funds



Programme Content (Cont'd)

Regulations

- ▲ AMFI & SEBI Regulations
- ▲ Selling Practices
- ▲ Investment Restrictions

Challenges for the Mutual Fund Industry

Who should attend?

This programme is ideal for

- ▲ Mutual funds / Asset Management Companies
- ▲ Broking houses
- ▲ Foreign Institutional Investors
- ▲ NBFCs
- ▲ Financial advisors/advisory firms
- ▲ Consultants
- ▲ Banks

Programme Details

The programme includes:

- ▲ Two day workshop
- ▲ Workbook
- ▲ Networking opportunities throughout the workshop
- ▲ Lunch and refreshments