

Report on
BSE Institute Mutual Fund Distributor Program for HVPM
Students

Duration: 50 Hours

Date : 18/2/2025

Introduction

The BSE Institute Mutual Fund Distributor Program is a 50-hour course designed to equip students with knowledge and skills to distribute mutual fund products. This program offers HVPM students the opportunity to enhance their understanding of the financial markets and pursue careers in the growing mutual fund industry.

Objectives

- **Knowledge Building:** Understand mutual funds, their types, and benefits.
- **Skill Development:** Learn skills in mutual fund distribution and client servicing.
- **Certification:** Gain a certification to become a qualified mutual fund distributor.
- **Career Growth:** Open job opportunities in the financial sector.

Program Overview

The program covers the following key areas:

- **Introduction to Mutual Funds:** Types, benefits, and structure.
- **Regulatory Framework:** SEBI regulations and distributor responsibilities.

- **Mutual Fund Types:** Equity, debt, hybrid, and sector funds.
- **Financial Planning:** Basics of financial goal setting and asset allocation.
- **Distribution Process:** Sales strategies, KYC norms, and client sourcing.
- **Investment Strategies:** SIPs, risk management, and long-term investing.
- **Client Relationship:** Building strong relationships and offering advice.

Benefits for HVPM Students

- **Knowledge & Skills:** Learn about mutual funds and personal finance.
- **Career Opportunities:** Eligibility to become a certified mutual fund distributor.
- **Certification:** A recognized credential to boost resumes.
- **Practical Exposure:** Hands-on training in mutual fund distribution.

Conclusion

The BSE Institute Mutual Fund Distributor Program offers valuable insights and practical skills to HVPM students, preparing them for successful careers in the financial sector. Completing this 50-hour course opens opportunities in mutual fund distribution and financial advisory roles.

Program Conduction by: Dr. Atul Kharad Asst Professor HVPM MBA

Date: 15th Sept 2024 to 15th Oct 2024

No. of Students Participated: 36

Regards

Dr. Atul E. Kharad



