





*Post Graduate Certificate in  
Management in*

# FINANCIAL MODELING & ALTERNATIVE INVESTMENTS

## Course Highlights

Data Analytics 

AICTE Approved Program 

Ubiquitous Learning 

Industry Interaction 

Alternative Investments 

New Career Opportunities 

*Post Graduate Certificate in Management in*

# FINANCIAL MODELING & ALTERNATIVE INVESTMENTS

"Emerging Markets are gaining Private Investors' confidence, with Southeast Asia and India being ranked amongst the top 3 Most Preferred Destinations by Global Investors, as per the Global Limited Partner Survey of Emerging Markets Private Equity Association, 2019 and 2020. Various forms of investment management services are imperative for the development of any economy, as Portfolio Managers understand the investment objectives and constraints of their clients and make suitable investments, as per the investment mandate. Alternative Investments Funds in India, such as Category III AIFs have been investing the funds faster, in order to generate alpha by employing diverse trading strategies. Moreover, Venture Capitalists (VCs) in India are willing to take the risk and provide start-ups with the initial capital required to bootstrap their business models and on-board their first paying customers. India is home to 100 unicorns across sectors which are collectively valued at over USD 240 billion, with two-thirds of these unicorns being formed after 2005."

## Course Objectives

There is a great demand for qualified professionals in the Alternative Investments market, to serve the Institutional Investors and High Networth Individuals allocating capital in big ticket sizes. The course will help you get practical knowledge on different legal structures permissible in Alternative Investment Funds, investment strategies deployed, applicable regulatory norms, due diligence practices, valuation policies, performance attribution and the accounting processes followed in this industry. Further, it provides an integrated learning experience with Data Analytics and Machine Learning tools required to apply the investment strategies, perform analysis, and report data in this industry"

## WHO IS THIS PROGRAM FOR:

Whether you want to make a career in the buy-side industry or become an Investment Manager, this program is the right one for you. Professionals who can seek this program are:

- Distributors and Marketing Professionals
- Research Analysts
- Family Office Consultants
- Wealth Management Firms
- Investment Advisors
- Institutions and HNI Investors
- Accountants and Fund Administrators
- Trustees
- Custodians
- Investment Managers
- Freshers
- Finance Students
- Lawyers and Tax Advisors

**Minimum Eligibility** - Graduate Degree from a Recognized University



# CAREER PROSPECTS:

After successful completion of this program, candidates would be suitable to explore professional opportunities in the following:

- Fund Management
- Distributorship
- Family Office Consultants
- Compliance and Regulations
- Due Diligence Experts
- Tax Advisors or Legal Advisors
- Fund Administrators
- Fund Accountants or Auditors
- Financial Data Analysts
- Registered Valuers
- Research Analysts
- Investment Advisory or Portfolio Management Services



## COURSE STRUCTURE

### Semester I

- Introduction to Alternative Investments
- Financial Management and Investments
- Hedge Funds and PMS

### Semester II

- Financial Modelling & Data Analytics For Hedge Funds And PMS
- Private Equity, Venture Capital and Angel Funds
- Financial Modelling and Data Analytics in Private Equity and Venture Capital
- Project Work

## Internship and Project Work

- Term Sheet Negotiation Process
- Global Hedge Funds Strategies
- Investment Research and Deal Sourcing
- Compliance Issues and Internal Controls
- Accounting and Fund Administration
- Fund Structuring and Taxation
- Market Research and Fund Distribution
- Trade Execution and Order Management System (OMS)
- Big Data in Financial Industry
- Role of Artificial Intelligence in Performance Analysis
- Projecting Cash Flows for Start-ups
- Investor Pitch Decks and Fund-raising

## Pedagogy:

The course will be conducted through interactive online sessions, covering the key concepts along with in-class assignments, discussions and presentations. Additional readings will be provided for covering the contemporary aspects on an ongoing basis.

## Assessment and Certification:

The participants will be required to appear for a Certification Assessment. The assessment will comprise of online assignments (30% weightage) and final end term examination (70% weightage). Upon successful completion of the assessment, all the participants shall be eligible to earn the Post Graduate Certificate in Management in Financial Modeling & Alternate Investments.

**Fees:** Rs. 25,000/- Payable module wise @ 12,500/module

**Evaluation:** Assignments (30% weightage) and End term exams (70% weightage)

**Duration:** 1 year (2 semesters)

**Eligibility and Selection Process:** Graduate Degree and Successful Completion of Online Interview

## KEY INDUSTRY EXPERTS

### Archit Lohia

*CFA, CA, CAIA, LLB – Founder & CEO at CareerTopper*

Archit is passionate about the Alternative Investments Market and aims at enabling finance professionals to hone the niche skills within this market. He is Chapter Executive of the CAIA Association India Chapter and an active member of the CFA Society, India. He has worked with Ernst & Young and BSE Ltd., in areas such as, Regulations, Compliance, IPO Process, Information Management Systems, Investment Analysis, Audit and Finance. His start-up works for Indian Regulators, Banks, Mutual Funds, Foreign Universities, Start-up Accelerators and a number of Training Institutes and B-schools. He likes to write books and articles on the Alternative Investments industry and is a regular speaker at national and international forums.



### Namarta Singhal

*Corporate Trainer/ Visiting Faculty*

Namarta is a Finance trainer with over 14 years of Industry experience. She has been associated with Moody's Analytics Knowledge Services (MAKS), since 2007. Since 2016 she has been handling independent training projects. Also, she is a member of The Indian Society for Training & Development (ISTD). Her areas of expertise include, Financial Modelling, Company Valuation, Corporate Finance, Finance and Accounting Management Analysis, Finance for Non-Finance, Investment Banking Research Services, Fundamental Analysis, Equity Research, amongst others. As a freelancer, she has been conducting training for AIMA, NSE, BSE, Ernst & Young, IMS, WNS, Exevo, Genpact, Reliance Capital, Edelweiss, IIFL etc. Namarta holds a Bachelors Degree in Commerce from Delhi University and a Masters in Business Administration from Guru Gobind Singh Indraprastha University, Delhi. She has also done her Diploma in Security Analysis and Portfolio Management from the Institute of Financial Management, Delhi.



## Contact Us

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