DIPLOMA IN INVESTMENT ADVISOR

The **Diploma in Investment Advisor** is a comprehensive program designed to prepare students, finance enthusiasts, and working professionals with **practical and theoretical expertise in financial markets, investment strategies, and wealth management practices**.

This course covers everything from **investment planning, portfolio management, taxation, and risk assessment to regulatory compliance and client advisory skills**, ensuring a holistic approach to financial advisory services.

Learners will gain hands-on exposure to **real market case studies, advisory simulations, and portfolio-building exercises**, making them industry-ready from day one.

The program also aligns with **SEBI and NISM certification requirements**, enabling participants to become **certified investment advisors** capable of offering **ethical, compliant, and profitable financial guidance** to individuals, families, and businesses.

By the end of this course, participants will be equipped to:

- Analyze financial markets and design tailored investment plans.
- Offer tax-efficient and goal-based financial solutions.
- Construct and manage diversified investment portfolios.
- Build long-term wealth strategies for clients.
- Establish a professional career as a trusted investment advisor

Program Highlights

- **Comprehensive Curriculum** – Covers Financial Markets, Investment Planning, Portfolio Management, Taxation, and Advisory Skills.
- **Industry-Aligned** – Designed as per **SEBI & NISM Investment Advisor Certification** requirements.
- **Practical Learning** – Case studies, live market sessions, and advisory simulations.
- **Expert Faculty** – Learn from industry professionals with real-world experience.
- **Skill Development** – Client profiling, risk assessment, asset allocation, and financial planning strategies.
- **Career-Ready** – Build a career as Investment Advisor, Wealth Manager, Financial Planner, or Portfolio Consultant.
- **Advanced Tools** – Exposure to technical & fundamental analysis, tax planning, and behavioral finance.
- **Internship & Placement Support** – Assistance in building your professional career.
- **Certification** – Earn a Diploma with guidance for **NISM-Series-X-A & X-B exams**.

•Program Fee – Rs 60,000 + GST

•Program duration – 4 MONTHS

Course Modules

•Introduction to Capital Market, Derivative market, Commodity market & Currency market.

•Technical Analysis

•Fundamental Analysis

•Research Analyst

DETAIL CURRICULUM

Module 1: Foundations of Financial Markets

- Introduction to Global & Indian Financial Markets
- Equity, Derivatives, Commodities & Forex Markets
- Understanding Securities, Bonds, Mutual Funds, and ETFs

Module 2: Investment Advisory & Planning

- Client Profiling and Risk Assessment
- Retirement & Pension Planning
- Insurance Planning & Wealth Protection
- Goal-based Financial Planning

Module 3: Portfolio Management

- Asset Allocation Strategies
- Mutual Fund Analysis & Selection
- Alternative Investments (REITs, AIFs, etc.)
- Performance Measurement & Rebalancing

Module 4: Taxation & Regulatory Framework

- Income Tax, Capital Gains, and Wealth Tax
- Tax-efficient Investment Strategies
- SEBI, RBI, IRDA & Other Regulatory Guidelines
- Ethics & Compliance for Advisors

Module 5: Advanced Investment Strategies

- Technical & Fundamental Analysis
- Hedging & Risk Management Techniques
- Global Investment Opportunities
- Behavioral Finance

Module 6: Practical Training & Case Studies

- Real-time Portfolio Construction
- Advisory Simulations & Client Presentations
- Case Studies on Wealth Management

Career Opportunity

- **Certified Investment Advisor**
- **Wealth Manager / Portfolio Manager**
- **Financial Planner**
- **Mutual Fund Distributor**
- **Equity / Debt Market Analyst**
- **Tax & Estate Planning Consultant**

Eligibility:

Candidate should be minimum graduate or post graduate in any stream

Why Choose This Course?

- Industry-oriented curriculum aligned with SEBI/NISM standards
- Practical exposure with live market case studies
- Guidance for **NISM-Series-X-A & X-B (Investment Advisor Certification)**
- Internship & placement assistance

- **Call us to Enroll Now at - 9205553004, 8447553003, 9205553005**
- **Email At : info@igfm.in**

Enroll Now