



Premier Banker

05 - 09 Aug 2024
Rome (Italy)



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Ref.: 15372_298277 **Date:** 05 - 09 Aug 2024 **Location:** Rome (Italy) **Fees:** 4900 **Euro**

Introduction

Customers that are often regarded as "preferred" or high-wealth clients of a bank or financial institution receive a variety of banking support services from premier bankers. To ensure rapid resolution, they offer individualized attention and elevate any complaints or difficulties customers may have. Additionally, they could contact customers to advertise bank goods and services. They create sales pitches and presentations. Their primary goal is to develop and maintain enduring connections with these valuable customers.

Premier bankers normally hold a bachelor's degree, however, they may also be qualified with an equivalent level of professional experience or education. They have expertise in the banking or wealth advisory industries, ideally with a background in financial services or customer service.

Targeted Groups

- Students who are keen to build a career by working for a Bank.
- Executives who are part of BFSI and want to upgrade their skill set for better career opportunities

Course Objectives

- Become well-versed in banking and finance, digital banking, mutual funds, and other topics.
- A set of banking and financial tools that will enable you to make more smart management and business decisions in today's company climate.
- The capacity to comprehend financial and banking records, evaluate the banking health of any organization, and make successful predictions.
- Increase one's self-assurance in their ability to contribute to financial decision-making in banking.
- Have a thorough understanding of the banking and financial sector from this course.
- Deliver knowledge inputs from the course and be exposed to the operational procedures and contemporary banking environment so they may efficiently perform operations linked to banking and finance.
- With this course, you may increase your chances of success in the banking sector, which is seeing rapid expansion.

Course Content

Chapter 1- Banking And Finance

- Overview of the BFSI industry
- Evolution of money and banking
- Role of banks and banking products and services
- Banking technology and trends
- Types of financial customers
- Wealth management
- Overview of other financial products and services

Chapter 2- Digital Banking

- Digital banking products
- Debit/credit/ atm cards
- ATMs
- Cash deposit machines
- Cash re-cyclers
- Mobile banking
- IMPs
- Internet banking
- Pos terminals
- Branchless banking
- Marketing of digital banking products
- Payment systems

Chapter 3- Mutual Funds

- Introduction to mutual funds
- Mutual funds structure
- Products & features - overview
- Regulations
- Offer document & investor services
- Debt funds
- Liquid funds
- Exchange traded funds
- Equity funds
- Taxation
- Performance of mutual funds
- Financial planning
- Introduction to advance mf & its keywords
- Financial planning advanced
- Mutual fund structure - advanced
- Mutual fund products- advanced
- Investment & risk management
- Valuation of schemes & accounting
- Fund distribution & sales practices
- Investor/investment services
- Scheme evaluation
- Legal & regulatory
- Investor protection

Chapter 4- Financial Market

- Investment basics
- Securities
- Primary market
- Secondary market
- Products in the secondary markets
- Derivatives
- Depository
- Mutual funds
- Products in the secondary markets

- Concepts & modes of analysis
- Ratio analysis

Chapter 5- Investment Advisory

- Introduction to financial planning
- Risk analysis, insurance, and retirement planning
- Investment planning, tax planning, and estate planning

Chapter 6: Securities Operations And Risk Management

- Introduction to the securities market
- Securities market
- Money markets
- Products traded in the Indian securities market
- Market participants in the securities market
- Introduction investors issuers intermediaries regulators
- Introduction to securities broking operations
- Introduction to the trade life cycle front office operations
- Middle office operations
- Back office operations
- Risk management
- Risk management
- Compliances and regulatory reporting core settlement guarantee fund
- Clearing process
- Role of the clearing agency
- Clearing banks and their function clearing members /custodians' depositories & depository participant's clearing process
- Settlement process
- Determination of settlement obligations- equity segment settlement of funds
- Settlement of securities
- Corporate actions adjustment
- Auction of securities
- Investor grievances and arbitration
- Investor grievance investor protection fund arbitration
- Other services provided by brokers
- IPO applications
- Trading of mutual fund units

Chapter 7: Equity Derivatives

- Basics of derivatives
- Understanding index
- Introduction to forwards and futures
- Commodity, equity & index futures
- Introduction to options
- Option trading strategies
- Introduction to trading systems
- Introduction to the clearing and settlement system
- Legal and regulatory environment
- Accounting and taxation
- Sales practices and investors protection services



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**Registration form on the :
Premier Banker**

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Full Name (Mr / Ms / Dr / Eng):

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