

Annexure 17

CHARTERED PORTFOLIO MANAGER[®] (CPM[®]) CERTIFICATION

If you practice portfolio or investment management in your work or want to make a career in ‘Portfolio Management’ earning the Chartered Portfolio Manager® (CPM®) Certification enhances your skills & knowledge. It serves to verify your achievements. The designation holders enjoy distinct professional advantages and are considered as ‘Leaders in the Field of Portfolio Management’.

CPM® are trusted by employers to deploy their skills, tools, and experience in bringing out clarity to decision-making processes, enhancing outcomes for their clients & organizations.

The Chartered Portfolio Manager® (CPM®) Designation is the verification that you have the skills, knowledge, ethics, and dedication to deliver this value in the workplace.

Today’s financial market is experiencing a lot of change, especially when its dynamic nature comes into picture. In such circumstances, there is an urgent need of portfolio managers, who can understand complex and varying requirements of clients and produce the financial results they desire.

The program concentrates on the practical application of financial and capital markets theory, investment and portfolio management and principles at the operational level within the financial services organization, thus providing momentum for continuing professional and personal development.

The program includes practical learning’s that can be straightway applied to create and manage ‘Winning Portfolio’s’ for all types of client requirements.

Chartered Portfolio Manager® (CPM®) certification significantly improves the chances of getting the desired role in portfolio management field and provides cutting-edge knowledge for the candidate.



PORTFOLIO MANAGEMENT

Portfolio Management is defined as the process of taking strategic decisions on the types of investments a client should invest in, deciding the investment policy decisions by creating ‘Investment Policy Statement’ for clients based on their investment objectives, risk taking ability and investment performance outlook.

Portfolio Management comprises skilfully managing an investment portfolio, by selecting the best investment pool in the right ratio and continuously shifting them in the portfolio, to increase the return on investment and maximize the wealth of the investor. Here, portfolio means collection of financial products, i.e. stocks, bonds, mutual funds, and so forth, that is held by the investors.

Learning Outcomes of Chartered Portfolio Manager® (CPM®) Program

- You will learn the theory and the real-world skills necessary to design, execute, and evaluate investment proposals that meet financial objectives.
- You will begin with an overview of global financial markets and instruments that characterize the investment opportunities available to today's investor.
- You will then learn how to construct optimal portfolios that manage risk effectively, and how to capitalize on understanding behavioural biases and irrational behaviour in financial markets.
- You will learn the best practices in portfolio management and performance evaluation as well as current investment strategies.
- By the end of your assigned Project Work in the course, you will have mastered the analytical tools, quantitative skills, and practical knowledge necessary for long-term investment management success.

REFERENCE MATERIALS

- Guided overviews for each module highlight key topics
- Assessments identify topics a participant already knows and those areas that require more time and attention
- More than 200 questions for continually testing knowledge and comprehension
- Features real-life case study scenarios and questions to apply your knowledge

In short, you will master sophisticated investment analysis and portfolio management techniques that are rigorously grounded in academic and practitioner literature.

WHO SHOULD ATTEND?

- Finance Professionals

- **Professional Trader, Technical expert, Research Analyst, Financial Advisor**
- **Bankers**
- **Want to be a Fund manager or Portfolio Manager**
- **Students and Professionals seeking to understand Portfolio Management Services**

WHAT ARE THE PRE-REQUIREMENTS TO ENROL FOR THE COURSE?

What are the Pre-Requirements to enrol for the Course?

- **No prior knowledge required to pursue the course. We start from the very basics. And build you to an Investment Analysis & Portfolio Management Guru.**
- **It's okay if math puzzles you out as every 'single equation' is explained one variable at a time. We tear it apart to its core and show you how simple it really is.**
- **You'll need a financial calculator**

WHAT ARE THE CERTIFICATION REQUIREMENTS?

In order to become a CPM® Designation holder and enjoy the benefits of increased CPM® salaries, you must pass one examination of 3 hours and have a bachelor's degree from an accredited institution at the time of grant of certification.

To enrol for the program, you need to be at least Intermediate (10+2).

CPM® Charter Holders are required to follow a strict code of ethics and rules that governs both their professional and personal conduct.

BENEFITS OF PURSUING CHARTERED PORTFOLIO MANAGER® (CPM®)

- **Use of Board-Certified Designations after your name on your Business Card and on your Promotional Materials.**
- **Global Certification in true sense and no territorial examination required.**
- **CPM® is awarded directly by American Academy of Financial Management, US.**

- **Protect your job and be recognized by an independent and global authority.**
- **Get the designation that illuminates your professional education, hard work and experience.**
- **The AAFM Credentials and Board Certifications are for those who want to rise above the rest.**
- **You can add CPM® to your Resume, Degree or Professional Licenses & Improve your image and salary potential.**
- **Publish on our US website as a Certified Member.**
- **Be part of Large Members Network of 300,000+.**
- **Members in more than 151 Countries with Global AACSB Alliance.**

WHAT WILL YOU STUDY IN CHARTERED PORTFOLIO MANAGER® (CPM®) CERTIFICATION COURSE?

- **Explore the latest advances in modern portfolio theory and differentiate your portfolio management skills by adopting international best practice**
- **Develop a checklist of key applied techniques in portfolio management that will remain with you throughout your career**
- **Become an expert in calculating and interpreting asset values and integrating risk pricing into your financial decisions**
- **Integrate optimum asset mix planning into your portfolio development strategies**
- **Maximize the impact of your reports and financial statements to improve client understanding and ensure buy-in to your portfolio management plans**
- **Appreciate the complexities of investing in emerging markets and develop strategies for managing risk and maximizing returns**

CURRICULUM

The curriculum consists of 10 modules which cover all asset classes, analysis of financial assets and portfolio management techniques.

Modules

- **1. Global Financial System**
- **2. Fundamentals of Portfolio Management**

- **3. Study of Investment Vehicles**
- **4. Corporate Financial Policy**
- **5. Financial Statement Analysis**
- **6. Equity Analysis**
- **7. Study of Alternative Investment Products**
- **8. Real Estate Valuation**
- **9. Asset & Portfolio Management Strategies and Techniques**
- **10. Legalities of Portfolio Management**

CPM® EXAMINATION

There is one Examination a Candidate needs to clear to meet the Academic Requirements of CPM® Certification Program.

Table

CPM® CERTIFICATION FEES

The candidates who wish to undergo the CPM® Certification Program need to register with AAFM®. A candidate can register with AAFM® by filling the Online Registration Form.

Table

#The Registration fees included free access to Online Study Material which can be accessed through the Student Account.

VALIDITY

The registration is valid for 365 days from the date of activation of registration by AAFM® India and the candidate is required to complete the certification within 3 Years from the date of first registration otherwise any completed Level will be treated nullified. After 365 days the registration can be renewed by logging into the candidate account and filling the Registration Renewal Form and paying Rs.6,000+GST as registration renewal fees.

BUILD YOUR CAREER

BE WISE

BE RICH

THANK YOU

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