

Naan Mudhalvan – Even Semester – Arts & Science – Session Plan				
Course Name	NBFC PRODUCTS & SERVICES			
Domain	<BCOM/BBA>			
University	PERIYAR UNIVERSITY			
Session Count	01			
Session Title	Introduction to the BFSI sector			
Duration	2.5 Hrs (Per session)			
Purpose of the Session	Overview of the Banking, Financial and Insurance industries.			
Learning Outcomes	By the End of this session, the student will be able to: 1.What is BFSI? 2.What is Banking and types of Banking? 3.What are Financial Services? 4. Importance of Insurance industries.			
Timings	Learning Topics	Use Cases/ Case Study/Project covered in the class by the trainer	Mapping Unit /LMS Module for this topic	Homework/Assignment for the students after the session
10.00 am	About BFSI and its importance	Refer to Project No 1 USE CASES : Case Study 1: Bank case study	Unit No 1 Module No 1.1	Create a Saving Accounts thru online.
10.30 am	About Banking		Unit No 1 Module No 1.1	
11.00 am	Banking Types and various operations		Unit No 1 Module No 1.1	
12.00	Various types of Financial Services		Unit No 1 Module No 1.1	
12.30	About Insurance and its importance		Unit No 1 Module No 1.1	

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PROJECT TO BE DONE BY STUDENTS

- 1) Evaluate challenges in digital Demat account processes and design a user-friendly interface using wireframing

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Course Name	NBFC PRODUCTS & SERVICES			
Domain	<BCOM/BBA>			
University	PERIYAR UNIVERSITY			
Session Count	02			
Session Title	BANKING OPERATIONS			
Duration	2.5 Hrs (Per session)			
Purpose of the Session	Types of Banking Operations, Types of Accounts, and Difference of various payment method.			
Learning Outcomes	By the End of this session, the student will be able to: 1.What is Bank and its importance? 2.What are various operations and services of Banks? 3.What are different type of Accounts? 4. Differentiate different payment methods. 5. Money Laundering and Anti Money laundering			
Timings	Learning Topics	Use Cases/ Case Study/Project covered in the class by the trainer	Mapping Unit /LMS Module for this topic	Homework/Assignment for the students after the session
10.00 am	Bank, Importance of it services	Refer to Project No 2 USE CASES : Case Study2: Yes bank problems with the regulatory pro-active decision	Unit No 1 Module 1.2	Ask students to use simple payment methods like Gpay, Internet Banking etc., Study about Harshth Metha's Money Laundering case
10.30 am	Various operations of Bank		Unit No 1 Module 1.2	
11.00 am	Different types of bank accounts		Unit No 1 Module 1.2	
11.30 am	Different type of payment methods and limitations		Unit No 1 Module 1.2	
12.30 pm	Money Laundering and Anti Money Laundering		Unit No 1 Module 1.2	

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PROJECT TO BE DONE BY STUDENTS

2) You are an operations head in a broking company, please Derive a detailed document list for Demat and Trading account opening for an Entity (proprietary account or Partnership firm)

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Course Name	NBFC PRODUCTS & SERVICES			
Domain	<BCOM/BBA>			
University	PERIYAR UNIVERSITY			
Session Count	03			
Session Title	Financial Services			
Duration	2.5 Hrs (Per session)			
Purpose of the Session	Financial Services and its various types and also about Financial intermediaries.			
Learning Outcomes	By the End of this session, the student will be able to: 1.What is Financial Services? 2. What are different types of Financial Products? 3.Who are Financial Intermediaries? 4. Role and importance of Financial Intermediaries.			
Timings	Learning Topics	Use Cases/ Case Study/Project covered in the class by the trainer	Mapping Unit /LMS Module for this topic	Homework/Assignment for the students after the session
10.00 am	What are Financial Services?		Unit No 1 Module 1.3	What are other feasible services that a Financial Institution can render?
10.30 am	Explain various types of Financial Services and Products.		Unit No 1 Module 1.3	
11.30 am	About Financial Intermediaries		Unit No 1 Module 1.3	Identify Financial Intermediaries in India.
12.30 am	Role and importance of Financial Intermediaries.		Unit No 1 Module 1.3	

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PROJECT TO BE DONE BY STUDENTS

3) analyse AML case studies to propose innovative fraud detection frameworks leveraging AI tools.

Naan Mudhalvan – Even Semester – Arts & Science – Session Plan				
Course Name	NBFC PRODUCTS & SERVICES			
Domain	<BCOM/BBA>			
University	PERIYAR UNIVERSITY			
Session Count	04			
Session Title	Insurance Services			
Duration	2.5 Hrs (Per session)			
Purpose of the Session	Know about importance of Insurance, various policies and its features and how to claim when an incident happens.			
Learning Outcomes	By the End of this session, the student will be able to: 1. Insurance and its importance 2. Various policies availability 3. Claiming process.			
Timings	Learning Topics	Use Cases/ Case Study/Project covered in the class by the trainer	Mapping Unit /LMS Module for this topic	Homework/Assignment for the students after the session
10.00 am	What is Insurance, Types of Insurance and its importance.	Refer Project No : 3	Unit No 1 Module 1.4	List down at least 5 insurance companies exist in India.
10.30 am	Various types of policies available.		Unit No 1 Module 1.4	
11.00 am	Importance of Health Insurance policies		Unit No 1 Module 1.4	Analysis various health insurance policies available with various insurance companies.
11.30 am	Policy Features and its Terms		Unit No 1 Module 1.4	Study about various terminologies exists in insurance sector.
12.30 pm	Claim settlement process.		Unit No 1 Module 1.4	

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PROJECT TO BE DONE BY STUDENTS

- 4) A person is faced with a personal injury accident, prepare a process to register the claim for his accident insurance.

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Course Name	NBFC PRODUCTS & SERVICES			
Domain	<BCOM/BBA>			
University	PERIYAR UNIVERSITY			
Session Count	05			
Session Title	KYC			
Duration	2.5 Hrs (Per session)			
Purpose of the Session	Importance of KYC			
Learning Outcomes	By the End of this session, the student will be able to: 1. What is KYC and its importance? 2. What is e-KYC and its importance?			
Timings	Learning Topics	Use Cases/ Case Study/Project covered in the class by the trainer	Mapping Unit /LMS Module for this topic	Homework/Assignment for the students after the session
10.00 am	KYC – Definition and its importance.	Refer Project No : 4	Unit No 1 Module 1.5	Down load a KYC form from any bank and fill it.
10.30 am	What is KYC for various types of Financial products?		Unit No 1 Module 1.5	
11.00 am	What is e-KYC and its importance and its working style?		Unit No 1 Module 1.5	Down load an e-KYC form from any bank and fill it.
11.30 am	KYC procedures for Mutual Fund Investments.		Unit No 1 Module 1.5	
12.30 pm	KYC procedures for Demat A/c.		Unit No 1 Module 1.5	

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Course Name		NBFC PRODUCTS & SERVICES		
Domain		<BCOM/BBA>		
University		PERIYAR UNIVERSITY		
Session Count		06		
Session Title		MUTUAL FUND		
Duration		2.5 Hrs (Per session)		
Purpose of the Session		To know details about Mutual Fund		
Learning Outcomes		By the End of this session, the student will be able to: 1. What is Mutual Fund 2. Importance of Mutual Fund 3. Types of Mutual Fund		
Timings	Learning Topics	Use Cases/ Case Study/Project covered in the class by the trainer	Mapping Unit /LMS Module for this topic	Homework/Assignment for the students after the session
10.00 am	What is Mutual Fund and its importance?	Project No : 5	UNIT NO : 2 MODULE : 2.1	Identify the various Mutual Fund companies.
11.00 am	How the Mutual Fund works?		UNIT NO : 2 MODULE : 2.1	Differentiate Mutual Fund and Equity Market.
11.30 am	What are the types of Mutual Funds?		UNIT NO : 2 MODULE : 2.1	
12.30 pm	Risk Profile of Mutual Fund		UNIT NO : 2 MODULE : 2.1	

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PROJECT TO BE DONE BY STUDENTS

- 5) You as mutual advisor, please prepare a question bank to explore the risk profile of a client.

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Course Name	NBFC PRODUCTS & SERVICES			
Domain	<BCOM/BBA>			
University	PERIYAR UNIVERSITY			
Session Count	07			
Session Title	MUTUAL FUND			
Duration	2.5 Hrs (Per session)			
Purpose of the Session	To know details about working of Mutual Fund			
Learning Outcomes	By the End of this session, the student will be able to: <ol style="list-style-type: none"> 1. What are the strategies being employed? 2. How Fund allocation and Diversification happens? 3. What are Fund selection criteria? 4. Fund Fact sheets 			
Timings	Learning Topics	Use Cases/ Case Study/Project covered in the class by the trainer	Mapping Unit /LMS Module for this topic	Homework/Assignment for the students after the session
10.00 am	What are different strategies being employed in Mutual Fund?	Project No : 6 Case study 3: Individual portfolio	UNIT NO : 2 MODULE : 2.2	Strategies being employed in equity market.
11.00 am	Fund allocation and diversification process		UNIT NO : 2 MODULE : 2.2	How to set up a own portfolio?
11.30 am	Fund selection criteria		UNIT NO : 2 MODULE : 2.2	
12.30 pm	How to know the fact sheets of a fund?		UNIT NO : 2 MODULE : 2.2	

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PROJECT TO BE DONE BY STUDENTS

- 6) Download a factsheet of an equity fund of any AMC and prepare a report on the basic and mandatory requirements in a factsheet

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Course Name		NBFC PRODUCTS & SERVICES		
Domain		<BCOM/BBA>		
University		PERIYAR UNIVERSITY		
Session Count		08		
Session Title		Process of Mutual Fund		
Duration		2.5 Hrs (Per session)		
Purpose of the Session		To know details about working process of Mutual Fund		
Learning Outcomes		By the End of this session, the student will be able to: 1. How to purchase and redeem? 2. What is SIP and SWP? 3. Tax implications.		
Timings	Learning Topics	Use Cases/ Case Study/Project covered in the class by the trainer	Mapping Unit /LMS Module for this topic	Homework/Assignment for the students after the session
10.00 am	Purchasing and Redeeming of Mutual Fund Units.	Project No : 7	UNIT NO : 2 MODULE : 2.3	How to buy and sell equity shares?
11.00 am	What is SIP and SWP?		UNIT NO : 2 MODULE : 2.3	What are saving schemes available with banks and post office?
11.30 am	How to calculate SIP and SWP?		UNIT NO : 2 MODULE : 2.3	
12.30 am	Tax implications of SIP & SWP.		UNIT NO : 2 MODULE : 2.3	

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PROJECT TO BE DONE BY STUDENTS

- 7) Prepare a SIP plan in Mutual Fund for a client at the age of 38 with a salary of Rs 1,20,000/- per month, whose short-term goal is to clear his home loan of 48 Lakhs in 10 years and also a long-term goal of 20 years to have a corpus of 1 Crore.

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Course Name		NBFC PRODUCTS & SERVICES		
Domain		<BCOM/BBA>		
University		PERIYAR UNIVERSITY		
Session Count		09		
Session Title		Evaluation of Mutual Fund		
Duration		2.5 Hrs (Per session)		
Purpose of the Session		To know details about Evaluation and Monitoring of Mutual Fund		
Learning Outcomes		By the End of this session, the student will be able to: <ol style="list-style-type: none"> 1. How to evaluate a scheme of Mutual Fund? 2. Fund Ratings 3. Portfolio Re-balancing 		
Timings	Learning Topics	Use Cases/ Case Study/Project covered in the class by the trainer	Mapping Unit /LMS Module for this topic	Homework/Assignment for the students after the session
10.00 am	Monitoring and Evaluating the Mutual Fund Investments.	Project No : 9	UNIT NO : 2 MODULE : 2.4	How will you evaluate and rate an equity shares?
11.30 am	Fund Manager Analysis and Fund Ratings.		UNIT NO : 2 MODULE : 2.4	
12.30 pm	Portfolio Re-balancing and Exit strategy.		UNIT NO : 2 MODULE : 2.4	

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PROJECT TO BE DONE BY STUDENTS

- 8) Prepare a performance report or a peer analysis based on any 2 AMC in the Hybrid fund's category using the AMFI INDIA.
- 9) Please download the latest quarterly report of any FMCG sector large-cap company listed and prepare a 2-pager key highlight of the company performance to submit to your client.

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Course Name		NBFC PRODUCTS & SERVICES		
Domain		<BCOM/BBA>		
University		PERIYAR UNIVERSITY		
Session Count		10		
Session Title		Distribution Module and Its process		
Duration		2.5 Hrs (Per session)		
Purpose of the Session		To know details about Distribution Modules and its process of Mutual Fund		
Learning Outcomes		By the End of this session, the student will be able to: <ol style="list-style-type: none"> 1. Distribution Module of Mutual Fund 2. NISM V-A Module 3. Distribution Registration Process 4. Purchase and Redemption Process of Mutual Fund. 		
Timings	Learning Topics	Use Cases/ Case Study/Project covered in the class by the trainer	Mapping Unit /LMS Module for this topic	Homework/Assignment for the students after the session
10.00 am	Distribution Module of Mutual Fund		UNIT NO : 2 MODULE : 2.5	Process of SEBI authorised equity dealer.
11.00 am	NISM V-A Module Certificates		UNIT NO : 2 MODULE : 2.5	
12.00 pm	Distribution Regd. Process		UNIT NO : 2 MODULE : 2.5	
12.30 pm	Purchase and Redemption Process of Mutual Fund.			

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Course Name	NBFC PRODUCTS & SERVICES			
Domain	<BCOM/BBA>			
University	PERIYAR UNIVERSITY			
Session Count	11			
Session Title	Capital Market			
Duration	2.5 Hrs (Per session)			
Purpose of the Session	Basis of Capital Market and its functions.			
Learning Outcomes	By the End of this session, the student will be able to: 1. What is Stock Market? 2. BSE, NSE 3. Primary and Secondary Market 4. Stakeholders of Capital Market			
Timings	Learning Topics	Use Cases/ Case Study/Project covered in the class by the trainer	Mapping Unit /LMS Module for this topic	Homework/Assignment for the students after the session
10.00 am	What is Capital Market and its functions?	Project No : 11 Case Study4: Mrs Aneka's portfolio analysis based on the Fundamental approach	UNIT NO : 3 MODULE : 3.1	Sector wise analysis of capital market.
11.00 am	Role and functions of BSE & NSE.		UNIT NO : 3 MODULE : 3.1	
12.00 pm	What is Primary and Secondary Market.		UNIT NO : 3 MODULE : 3.1	
12.30 pm	Stakeholders of Capital Market.		UNIT NO : 3 MODULE : 3.1	

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PROJECT TO BE DONE BY STUDENTS

- 10) Prepare an analysis report on the Nifty50 index such as the list of stocks, the sectors they belong, and also weightage of each stock.

Naan Mudhalvan – Even Semester – Arts & Science – Session Plan				
Course Name	NBFC PRODUCTS & SERVICES			
Domain	<BCOM/BBA>			
University	PERIYAR UNIVERSITY			
Session Count	12			
Session Title	Technical Evaluation of Equities.			
Duration	2.5 Hrs (Per session)			
Purpose of the Session	Fundamental and Technical analysis of Equity market.			
Learning Outcomes	By the End of this session, the student will be able to: <ol style="list-style-type: none"> 1. Investment basis of Equities 2. Valuation of Equities 3. Fundamental Analysis and Ratio Analysis 4. Technical Analysis 			
Timings	Learning Topics	Use Cases/ Case Study/Project covered in the class by the trainer	Mapping Unit /LMS Module for this topic	Homework/Assignment for the students after the session
10.00 am	Investment basis of Equities	Project No : 12 & 13 Case Study5: Real life case study of Mr Kumar trading behavior using technical analysis	UNIT NO : 3 MODULE : 3.2	Use various indicator to analysis further.
11.00 am	Valuation of Equities		UNIT NO : 3 MODULE : 3.2	
11.30 am	Fundamental and Ratio Analysis of Equities		UNIT NO : 3 MODULE : 3.2	
12.30 pm	Technical Analysis of Equities		UNIT NO : 3 MODULE : 3.2	

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PROJECT TO BE DONE BY STUDENTS

- 11) Prepare a 1-page technical analysis report on your favorite stock listed under the Nifty 50 index .
- 12) Prepare a process to place a Stop loss order on a sell position based on your technical analysis.

Naan Mudhalvan – Even Semester – Arts & Science – Session Plan				
Course Name		NBFC PRODUCTS & SERVICES		
Domain		<BCOM/BBA>		
University		PERIYAR UNIVERSITY		
Session Count		13		
Session Title		Investment psychology and behaviour of Equity Market.		
Duration		2.5 Hrs (Per session)		
Purpose of the Session		To act rationally in the equity market.		
Learning Outcomes		By the End of this session, the student will be able to: 1. Investment psychology and behaviours of Equity Market. 2. Investor's Risk profile and Goal Settings 3. Short and Long Term investment strategies		
Timings	Learning Topics	Use Cases/ Case Study/Project covered in the class by the trainer	Mapping Unit /LMS Module for this topic	Homework/Assignment for the students after the session
10.00 am	Investment psychology and behaviours of Equity Market.		UNIT NO : 3 MODULE : 3.3	
11.30 am	Investor's Risk profile and Goal Settings		UNIT NO : 3 MODULE : 3.3	
12.30 pm	Short and Long Term investment strategies		UNIT NO : 3 MODULE : 3.3	

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PROJECT TO BE DONE BY STUDENTS

- 1) Mr Arjun's father is getting a retirement benefit of Rs 62 lakhs, do a risk-return analysis and come out with a solution for a probable investment allocation
- 2) Develop a Systematic Investment Plan (SIP) calculator that allows users to determine the investment amount and frequency

Naan Mudhalvan – Even Semester – Arts & Science – Session Plan				
Course Name	NBFC PRODUCTS & SERVICES			
Domain	<BCOM/BBA>			
University	PERIYAR UNIVERSITY			
Session Count	14			
Session Title	Order placing Mechanism in Equity Market.			
Duration	2.5 Hrs (Per session)			
Purpose of the Session	To enter and exit in the equity market.			
Learning Outcomes	By the End of this session, the student will be able to: <ol style="list-style-type: none"> 1. Mechanism in buying and selling equity market. 2. Nsmart/neostox trading platform 3. Function of Nsmart / neostox trading platform 4. Terminologies in equity market. 			
Timings	Learning Topics	Use Cases/ Case Study/Project covered in the class by the trainer	Mapping Unit /LMS Module for this topic	Homework/Assignment for the students after the session
10.00 am	Mechanism in buying and selling equity market.	Project No: 14	UNIT NO : 3 MODULE : 3.4	Use other platform to buy and sell equities.
10.30 am	Nsmart/neostox trading platform		UNIT NO : 3 MODULE : 3.4	
11.30 am	Function of Nsmart / neostox trading platform	Project No: 15	UNIT NO : 3 MODULE : 3.4	
12.30 pm	Terminologies in equity market.		UNIT NO : 3 MODULE : 3.4	

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PROJECT TO BE DONE BY STUDENTS

- 13) Implement a trading system using NSMART (or www.neostox.com) that enables users to place orders, buy/sell shares, and explore various functionalities.
- 14) Prepare a process to become a SEBI registered Research Analyst to start your own robo-advisory firm.

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Course Name	NBFC PRODUCTS & SERVICES			
Domain	<BCOM/BBA>			
University	PERIYAR UNIVERSITY			
Session Count	15			
Session Title	Income Tax and GST for securities			
Duration	2.5 Hrs (Per session)			
Purpose of the Session	To know the IT and GST implications in equity.			
Learning Outcomes	By the End of this session, the student will be able to: <ol style="list-style-type: none"> 1. Regulation of Income Tax in securities. 2. Capital Gain and its dividends 3. Tax implication on dividend 4. Tax saving options 			
Timings	Learning Topics	Use Cases/ Case Study/Project covered in the class by the trainer	Mapping Unit /LMS Module for this topic	Homework/Assignment for the students after the session
10.00 am	Regulation of Income Tax in securities.	Case study 6: Mr YYY Tax calculation, an IT employee with multiple source of income	UNIT NO : 4 MODULE : 4.2	Analysis different type govt. saving options.
11.00 am	Capital Gain and its dividends		UNIT NO : 4 MODULE : 4.2	
12.00 pm	Tax implication on dividend		UNIT NO : 4 MODULE : 4.2	
12.30 pm	Tax saving options		UNIT NO : 4 MODULE : 4.2	

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PROJECTS TO BE DONE BY STUDENTS

- 15) Create a capital gain tax calculator for STCG and LTCG for an individual using Excel 14

Naan Mudhalvan – Even Semester – Arts & Science – Session Plan				
Course Name	NBFC PRODUCTS & SERVICES			
Domain	<BCOM/BBA>			
University	PERIYAR UNIVERSITY			
Session Count	16			
Session Title	Input and Output Tax Credit			
Duration	2.5 Hrs (Per session)			
Purpose of the Session	To know more about Input Tax Credit			
Learning Outcomes	By the End of this session, the student will be able to: <ol style="list-style-type: none"> 1. What is Input and Output Credit? 2. ITC for market participants 3. Eligible for ITC 4. Documents required for compliance of GST 			
Timings	Learning Topics	Use Cases/ Case Study/Project covered in the class by the trainer	Mapping Unit /LMS Module for this topic	Homework/Assignment for the students after the session
10.00am	What is Input and Output Credit?		UNIT NO : 4 MODULE : 4.2	How to validate the documents submitted?
10.30 am	ITC for market participants		UNIT NO : 4 MODULE : 4.2	
11.30 am	Eligible for ITC		UNIT NO : 4 MODULE : 4.2	
12.30 pm	Documents required for compliance of GST		UNIT NO : 4 MODULE : 4.2	

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PROJECTS TO BE DONE BY STUDENTS

- 16) Mr Arjun's father is getting a retirement benefit of Rs 62 lakhs, do a risk-return analysis and come out with a solution for a probable investment allocation

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Course Name	NBFC PRODUCTS & SERVICES			
Domain	<BCOM/BBA>			
University	PERIYAR UNIVERSITY			
Session Count	17			
Session Title	Emerging Trends in NBFC			
Duration	2.5 Hrs (Per session)			
Purpose of the Session	To be updated in NBFC products and Services.			
Learning Outcomes	By the End of this session, the student will be able to: 1. Definition and scope of emerging trends and technologies in NBFC.			
Timings	Learning Topics	Use Cases/ Case Study/Project covered in the class by the trainer	Mapping Unit /LMS Module for this topic	Homework/Assignment for the students after the session
10.00 am	Overview of NBFC products and services.	Case study 7: Mr XXX fraud advisory case study	UNIT NO : 5 MODULE : 5.1	Forecast the role of AI in NBFC.
11.30 am	Definition for Emerging trends		UNIT NO : 5 MODULE : 5.1	
12.30 pm	Technologies being employed in NBFC.		UNIT NO : 5 MODULE : 5.1	

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PROJECTS TO BE DONE BY STUDENTS

- 17) Develop a Systematic Investment Plan (SIP) calculator that allows users to determine the investment amount and frequency

Naan Mudhalvan – Even Semester – Arts & Science – Session Plan				
Course Name	NBFC PRODUCTS & SERVICES			
Domain	<BCOM/BBA>			
University	PERIYAR UNIVERSITY			
Session Count	18			
Session Title	Digital payments and AI algorithm			
Duration	2.5 Hrs (Per session)			
Purpose of the Session	To be updated in NBFC products and Services.			
Learning Outcomes	By the End of this session, the student will be able to: <ol style="list-style-type: none"> 1. Digital payments and various method of payment system. 2. Robo Advisory and Algorithmic Trading 3. Automated Investment Platform and AI based Trading strategies. 			
Timings	Learning Topics	Use Cases/ Case Study/Project covered in the class by the trainer	Mapping Unit /LMS Module for this topic	Homework/Assignment for the students after the session
10.00 am	Digital payments and various method of payment system.	Project No: 18	UNIT NO : 5 MODULE : 5.2	Get experienced in various payment systems and realise the differences.
10.30 am	Robo Advisory and Algorithmic Trading		UNIT NO : 5 MODULE : 5.2	Write down the logic for automated trading strategies.
11.15 am	Automated Investment Platform and AI based Trading strategies.	Project No: 19	UNIT NO : 5 MODULE : 5.3	
12.30 pm	How to create a dash board?	Project No: 20	UNIT NO : 5 MODULE : 5.3	Build your own dash board using Power BI.

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PRODUCTS TO BE DONE BY STUDENTS

- 18) Develop an algorithmic trading platform that utilizes AI-based strategies and incorporates risk management techniques.
- 19) Analyze emerging trends and technologies in the Indian FinTech sector and present a comprehensive overview.
- 20) Build a dashboard that tracks the performance of selected mutual funds and provides alerts for portfolio rebalancing.