



College of Insurance

Insurance Institute of India, Mumbai

Classroom Training Session on Comparative Analysis and Performance of Mutual Funds Vrs. ULIPS (CT-CAPMF), (From: 17th to 18th December, 2024)

Program Concept and Objectives:

Managerial and Investment skills are the prime requirement for structuring investment portfolio for individual or an institution. The success of portfolio or an investment plan depends upon number of internal and external factors. These factors and forces are uncertain and uncontrollable. In such situation, maintaining the rate of returns on investment sufficiently high, over and above the inflation rate is the prime skill of the fund's manager. ULIPS and Mutual funds are the old vehicle of investment in India. The decade 1990 opened up the door for domestic and foreign mutual funds. Now, investment in mutual funds is an attractive option for the small and big investors. The growth mutual funds industry is remarkable in India. Many public and private insurance companies have introduced the ULIPS product since 1995.

Even the Managers who have many years of experience and been successful in the past in managing funds and creating wealth for an organisation, need to recharge themselves and keep themselves alert to the ever changing challenges of investment that Managers/ officers/ individual tend to face in modern times.

In this context, the College of Insurance has designed this program to provide a stronger understanding of investment in ULIPS and Mutual funds to offices/ Manager's/ individual involved in investment roles.

Key Takeaways from the Program:

The program is designed to provide insights to the participants in the following areas:

- Learning the detail about schemes of ULIPS and Mutual Funds, its documentation.
- Relearning of the management challenges required for portfolio investment in the present day.
- Aligning with investment goals and transmitting these goals into action.
- Understanding of tax planning using invest outlet ULIPS and Mutual funds schemes.
- Risk diversification using both investment outlets.
- Comparative analysis of ULIPS Vrs. Mutual funds.
- Case studies of ULIPS and Mutual funds schemes.



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Participant Profile:

Practitioners in insurance, banking and investment advisors , working in the finance , marketing, technical , and Human resources departments of insurance and Banking sectors.

Program Coordinator:

Dr. Sanjay Tupe

022-69654203

Email: tupe@iii.org.in

Program Duration & Timing:

2 days & from 10.00 a.m. to 05.00 p.m.

Program Fees:

- **Participants requiring residential facilities: Total amount Required –Rs. 11800/- i.e. (Rs. 10000/- plus 9% CGST + 9% SGST).**

The fees cover tuition, course material, A/C single room accommodation in the Institute's campus and full boarding (bed tea/coffee, breakfast, lunch, light refreshments in the evening and dinner). All rooms are fully furnished with attached bathroom and Internet facility.

Rooms are reserved from 12.00 noon onwards the day prior to the commencement of the program. The participants can stay till 12.00 noon next day after the conclusion of the program.

- **Non-residential participants: Total amount Required –Rs. 8496/- i.e. (Rs. 7200/- plus 9% CGST + 9% SGST).**

The fees cover tuition, course material and day boarding (i.e. tea/coffee during tea breaks and lunch for actual days of training).

Payment Terms and Conditions:

- 1) The payment should be received by the College of Insurance before the commencement of the program.
- 2) The confirmation of registration for the program will be subject to receipt of payment.

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3) Please see below details for Bank Transfer.

Name of the Beneficiary	Insurance Institute of India
Account No.	004010100143462
IFS Code	UTIB0000004
MICR Code	400211002
Swift Code	AXISINBB004
Name of Bank	Axis Bank Ltd
Address	Branch - Fort Branch Address - Universal Insurance Building, Ground Floor, Sir P M Road, Fort, Mumbai - 400001.

4) For online payment mode by following the below link

https://www.insuranceinstituteofindia.com/o/COI_WebPortal/cmc/eventDetails?eventid=2268

Program Venue, Location and Parking:

Program Venue:

College of Insurance,
Insurance Institute of India,
C-46, G-Block, Bandra-
Kurla Complex,
Mumbai - 400 051 India.

Please follow the link /
scan QR Code for
training venue.



<https://qrگو.page.link/qs2Qb>

Public parking available at 5 minutes walking distance (Behind US Consulate).

Program Team:

Ms. Nilambari Bagde	college_insurance@iii.org.in	022-69654234
Ms. Yogeeta Kulkarni		022-69654255
Mr. Sujay Mahadik		022-69654251
Ms. Akshara Nagpal		022-69654266
Ms. Jayashree Salian		022-69654249
Ms. Mrunal Satam		022-69654216