



# College of Insurance

## Insurance Institute of India, Mumbai

### Classroom Training Session on Understanding Bond Markets for Insurance Investments (CT-UBMII)

(From: 22<sup>nd</sup> to 23<sup>rd</sup> January, 2025)

#### Program Concept and Objectives:

Insurance Companies have substantial and recurring cash inflows from insurance premiums, net of claims. They also earn dividends and sale proceeds of equity investments, and coupon investment and maturity cash flows from its bond portfolio. The investment norms of Insurance Companies are guided by the statutes such as the Insurance Act, 1938 and the IRDAI Regulations on Investment issued and as applicable from time to time. The Investment Portfolio of Insurance Companies be it Life, General or Reinsurance consists substantially of Bonds, predominantly G-Sec, as well as SDL and Corporate Bonds. The investment style in bonds has been Hold-to-Maturity (HTM).

#### Key Takeaways from the Program:

- To update the conceptual knowledge and skills of the diverse participants to a desired base level in Bond and Debt Markets
- To demonstrate the linkage between concepts and application with skill-based exercises and cases
- To familiarize the participants with investment and trading strategies in bonds
- Learning Outcomes: at the end of this programme, the participants will be able to:
- To spot anomalies between intrinsic values and prices
- To read and analyse trends in yields based on macroeconomic events and utilize Bloomberg and other news feeds
- To identify opportunities to engage in contrarian trades on the sell and buy side

#### Program Contents:

- Topics relating Bond Markets and Bond trading – Bond trading strategies.
- Sessions will be conducted in interactive mode, aided by presentation material, practical examples.

#### Participant Profile:

Executives and officers working in Investment Departments of Insurance Companies and the officers responsible for managing Pension and PF funds and also the executives managing the Investment portfolios in Societies, etc.,



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**Classroom Training Session on Understanding Bond**  
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**Program Coordinator:**

Mr. Subash Pattanayak

022-69654204

Email: [pattanayak@iii.org.in](mailto:pattanayak@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/cmcc/eventDetails?eventid=2287](https://www.insuranceinstituteofindia.com/o/COI_WebPortal/cmcc/eventDetails?eventid=2287)

**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://qrgo.page.link/qs2Qb>

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

**Program Team:**

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