

Classroom Training Session on Comparative Analysis and Performance of ULIPs & Mutual Funds (CT) 13th – 14th May, 2025

Program Concept and Objectives:

ULIPs and Mutual Funds are both popular investment options that cater to different investor needs. Knowing their structures, benefits, and limitations allows advisors and investors to make informed decisions. Knowledge about Unit Linked Insurance Plans (ULIPs) and Mutual Funds is very important, particularly for individuals involved in financial planning, investment advisory, or the insurance industry. Both ULIPs and Mutual Funds involve market-linked returns. Understanding their risk-return profiles helps in aligning them with the investor's financial goals, risk appetite, and time horizon.

Keeping this in view, College of Insurance has designed a two day program on Comparative Analysis with an objective to create understanding about various investment strategies and how diversification serves as an effective tool in mitigating market risks.

Key Takeaways from the program: The participants of the program will gain knowledge and insight into the following

- Understanding Investment Options
- Risk and Return Management
- Comprehensive Financial Planning
- Regulatory and Tax Implications
- Product Suitability and Comparison
- Market Volatility and Investment Strategies
- Meeting Customer Expectations
- Industry Growth and Opportunities

Participant Profile:

Executives working for Insurance Companies, Brokers, Corporate Agents, Specified Persons, Insurance advisors, MF distributors and persons who are interested in selling market linked products.

PROGRAM DURATION & TIMING: Duration: 2 days, Time: 10.00 a.m. to 05.00 p.m.

Program ID : CPL

PROGRAM COORDINATOR:

Dr Ramesh Kumar Satuluri

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Contact No: 022-69654263

PROGRAM FEES:

Residential Participants:

₹ 11,000/- + GST

Non-residential participants:

₹ 8,000/- + GST

**FOR REGISTRATION
CLICK HERE**

PROGRAM VENUE:

College of Insurance
Insurance Institute of India,
Plot No. C-46, G-Block,
Bandra-Kurla Complex,
Mumbai - 400 051.

Please follow the link /
scan QR Code for
training venue



<https://qrgo.page.link/qs2Qb>

Program Team:

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