



College of Insurance Insurance Institute of India, Kolkata Virtual Training Session on Equity investment & Valuation of Life Companies (CVT-EI&VLC) (On: 8th December, 2024)

Program Concept and Objectives:

The resilience of insurance companies is a testimony to their financial soundness. To a large extent, the financial soundness is a function of a solid investment portfolio. The Insurance Companies hold good amount of investment assets in equity portfolio. While the classic investing principles put forth by Andrew Bailey regarding liquidity, safety and yield, continue to hold good even now, the Life Insurers are facing ever increasing volatility and complexity in the financial markets. There is now a felt need:

- For an upskilling program for the team
- To provide an overall and fresh perspective towards stock selection
- To acquaint the team with the latest approaches and techniques in equity valuation
- To develop independent stock-selection skills and conduct independent buy-side research
- To critically evaluate research reports given out by sell-side analysts in stock-broking firms

With this critical function and its far reaching implications in view, the College of Insurance has designed a half day virtual training program to provide exposure to equity investment teams of Life Insurance Companies on contemporary developments, approaches and techniques, so as to spot disparities between the discovered prices and intrinsic values of equities, in order to avail of buy/sell opportunities and also enable some churn to strengthen the portfolio in the long run.

Key Takeaways from the Program:

At the end of the Program, a participant should be able to:

- Synthesize the learnings on stock selection in a systematic manner, within an Indian context
- Read and interpret government policy, latest developments in business and technology
- Understand DCF and EV/EBITDA approaches and their components, develop valuation frameworks based on contemporary knowledge and apply the same using EXCEL spreadsheets
- Understand the stock-picking methods followed by external analysts and stock-broking firms



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Participant Profile:

The executives and officers working in Investment department of an Insurance company and Portfolio Managers and Fund Managers.

Program Coordinator:

Mr Judhajit Sen, Faculty

Email: j.sen@iii.org.in

Program Duration & Timing:

1 day & from 10.00 a.m. to 01.00 p.m.

Program Fees:

The Program Fees: Rs.1770/- (Rs. 1500/- + 9% CGST + 9% SGST)

How to Enroll:

Please click the below link to register the program

https://www.insuranceinstituteofindia.com/o/COI_WebPortal/cmc/eventDetails?eventid=2117

Certificate of Participation:

Online Certificate in PDF format will be issued to all the participants.

Program Team:

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