

Syllabus - Stock Market & Personal Finance

Stock Market

Stock Market: Introduction (13 Sessions)

Module 1 - Stock and Stock Market Basics

Module 2 - Economics and Stocks

Stock Market: Beyond the Basics (26 Sessions)

Module 3 - Fundamental Analysis

Stock Market: Certified Stock Trader (33 Sessions)

Module 4 - Technical analysis

Module 5 - Portfolio Management

Personal Finance

Personal Finance: A to Z! (7 Sessions)

Module 1 - Basics of Financial Planning

Module 2 - Investment Vehicles and Options

Module 3 - Case Study - Build your own financial plan!

Stock Market

Stock Market: Introduction (13 Sessions)

Module 1 - Stock and Stock Market Basics

Session 1 -

What is a stock?

What is a stock market and why does it exist?

Primary vs Secondary market

IPO vs FPO

Session 2 -

Who sets the price in a stock market?

How and why does someone make money in the stock market?

How and why does someone lose money in the stock market?

Session 3 -

What are stock exchanges? (Indian Context)

What are types of securities?

Introduction to Index (Sensex & Nifty)

Session 4 -

Intro to ETF

What is an Index fund?

ETF vs Index Fund?

Session 5 -

What is DEMAT?

What is a Trading Account?

What is a Trading Terminal?

Session 6 -

What is the difference between Investing and Trading?

What are the ways to invest in the stock market?

Session 7 -

Who are stockbrokers and how do you choose them?

Who are the investors in the stock market?

Module 2 - Economics and Stocks

Session 8 - Basics of Eco

What is Economics?

What is Microeconomics?

What is Macroeconomics?

GDP?

Economic indicators?

Real examples

Session 9 - Indian economy

Indian economy breakdown - history and current

Sectors in India and their role in the economy

Session 10 - EIC Analysis (Economy-industry-stock analysis)

Economy - Industry Performance?

Industry - Stock performance?

Session 11 - Intro to Data, Excel and Finance Terms (Part 1)

Excel basics - operation on historical data

Google finance and Live Data operation

Session 12 - Intro to Data, Excel and Finance Terms (Part 2)

Financial Terms - PV, FV, Annuity, NPV, IRR

With examples

Session 13 - SWOT Analysis & Porter's 5 Forces

Stock Market: Beyond the Basics (26 Sessions)

Note - Everything under 'Stock Market: Introduction' will be covered with the following additional topics

Module 3 - Fundamental Analysis

Session 14 - Intro to Fundamental Analysis

What is Fundamental Analysis?

Terms?

Session 15 - Qualitative Fundamental Analysis

Session 16 - Quantitative Fundamental Analysis

Session 17 - Intro to Financial Statements

What are the three FS? P&L, BS, Cash Flow

Session 18 - Understanding P&L statements

With 2-3 company examples

Session 19 - Understanding Balance Sheet

Session 20 - Understanding Cash Flow Statements

Session 21 - Financial Ratio Analysis (Part 1)

Intro to Financial Ratios?

Significance of Financial Ratios?

Drawbacks of Financial Ratios?

Session 22 - Financial Ratio Analysis (Part 2)

Activity Ratios with exs

Session 23 - Financial Ratio Analysis (Part 3)

Liquidity & Solvency Ratios with exs

Session 24 - Financial Ratio Analysis (Part 4)

Profitability & Valuation Ratios with exs

Session 26 - Understanding Relative and Intrinsic Valuation, DCF Analysis

With examples

Stock Market: Certified Stock Trader (33 Sessions)

Note - Everything under 'Stock Market: Beyond the Basics' will be covered with the following additional topics

Module 4 - Technical analysis

Session 27 - Intro to technical analysis

What is technical analysis?

Principles and assumptions behind technical analysis

Technical vs Fundamental Analysis

Session 28 - Core concepts

EMH (Efficient Market Hypothesis)

DoW theory

Moving Averages, Data and Crossover

Session 29 - Chart & Patterns

Session 30 -

Charting software and indicators

MACD Indicator

Session 31 - RSI Indicator + Bollinger Bands

Module 5 - Portfolio Management

Session 32 - Portfolio Management

Intro to Modern Portfolio theory & concept of Beta

Correlation Function for Portfolio management

Session 33 -

Understand active & passive portfolio management

Personal Finance

Personal Finance: A to Z! (7 Sessions)

Module 1 - Basics of Financial Planning

Session 1 -

Pillars of Financial Planning (Protection, Taxation and Retirement)

Power of Compounding

Defining Financial Objectives

Session 2 -

Common Mistakes

Understanding cash flow

Understanding risk

Low and high return options

Module 2 - Investment Vehicles and Options

Session 3 - Life & Health Insurance

Life Insurance - For Self

Health Insurance - For Self
Parental Health Insurance

Session 4 - Mutual Funds, SIPs, ELSS

Session 5 - Others

PPF, NSC, NPS, PMVY

Module 3 - Case Study - Build your own financial plan!

Session 6 & 7 -

Retirement analysis, saving for goals, higher education planning etc. according to risk appetite and investment horizon