UPskill Series

networkFP®
The Network of Personal Finance Professionals

A Complete Guide to

MF Categorization & Product Suitability

Delivered by Leading Fund Managers and MF Professionals

A Professional Development Program for

Personal Finance Professionals (PFPs)

MUTUALFUNDS Sahi Hai

But which one ?

₹50+ Lakh Crores is currently managed by 45 Mutual Fund Companies in over 1,500+ MF schemes under 40+ categories. The MF industry has grown by leaps and bounds in the last decade. And it's expected to cross ₹100 Lakh Crores within next 5 years!

Amongst many initiatives to protect and promote MF industry, **SEBI introduced MF Categorization and Rationalisation.** Currently there are 40+ categories under which AMCs can launch their schemes.

While MFs have become a popular investment avenue, there is still a lack of understanding of each of these 40+ categories spread across **equity, hybrid, debt, passives and others**. Not just at investors level but even amongst MF Distributors and Advisors.

Network FP's UpSkill series for **Personal Finance Professionals (PFPs)** will address this critical need by conducting a focused and structured program with practical insights and useful resources.

You are invited to attend and benefit, so that you can serve your clients better and grow your practice / career.

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40+ Mutual Fund Categories

SEBI under it's MF Categorization and Rationalization has categorized Mutual Funds into the following categories under these broad heads.

Equity

- Large cap Fund
- Large & Mid-cap
- Mid-cap funds
- Small Cap fund
- Multi-cap fund
- Flexi Cap
- Value Fund
- Contra Fund
- Dividend Yield
- Sectoral/ Thematic
- Focused Fund
- ELSS
- Equity Index

Hybrid

- Conservative Hybrid
- Balanced Hybrid
- Aggressive Hybrid
- Dynamic Asset
- Multi Asset
- Arbitrage Fund
- Equity Savings

Debt

- Overnight Fund
- Liquid funds
- Ultra Short Term
- Short Term
- Low Duration Fund
- Money Market
- Short Duration
- Medium Duration
- Medium to Long
- Long Duration
- Dynamic Bond
- Corporate Bond
- Credit Risk Fund
- Banking and PSU
- Floater Fund
- Gilt Fund
- Fixed Maturity
- Debt Index

Others

- Index Funds
- Sectoral Funds
- Fund of Funds
- Gold ETFs & Gold Fund
- REITs, INVITs

Solution

- Retirement
- Children

But which one

should you recommend to which client?

Who should attend?

Network FP's content are tailored for financial advisors and distributors seeking to build and grow their career / practice / business. By whatever name you identify yourself today, at Network FP we call you as;

Personal Finance Professionals (PFPs)

- Financial Advisor
- MF Distributor
- Investment Advisor
- Stock- Brokers
- Insurance Consultants
- Capital Market Pros
- Relationship Managers
- Financial Planners
- Qualified Personal Finance Professionals (QPFP)
- Certified Financial Planners (CFP)
- Wealth Managers

Every professional dealing with mutual funds for their clients will benefit from the program

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What you learn?

NFP UpSkill Series on MF Categorization & Suitability is designed to give participants clarity on 40+ categories by covering the following topics;

- Category structure & securities
- Category advantages & benefits
- Category performance & returns
- Risks associated in each category
- Category co-relation with markets
- Product suitability for investor profile
- Mapping clients goals to categories
- Evaluating & short-listing funds
- Myths & Facts of each category
- Questions & Answers with Experts

Get Complete Clarity on 40+ MF Categories

Bonus for NFP ProMembers

- 4 ProTools for MF Professionals
- 4 Resources for MF Professionals
- 12 Quizzes with ACE Points
- Program Completion Certificate

Program Curriculum & Schedule

This series is spread across 4 weeks / 16 hours
including Sessions, Q&As, ProTools, Resources & Quizzes

Week 1 | 29 May 9:30 AM to 2:00 PM

Equity MFs Part 1

- Large Cap
- Mid Caps
- Small Cap

Equity MFs Part 2

- Large & Mid Cap
- Multi Cap
- Flexi Cap

Equity MFs Part 3

- Focused Fund
- Sectoral Funds
- Thematic Fund

ProTool 1 - MF Product Suitability Matrix

- Find Suitability based on Investor Risk
- Find Suitability based on Time Horizon
- Map Right products to right investors

Week 2 | 05 June 9:30 AM to 2:00 PM

Equity MFs Part 4

- Value Fund
- Contra Fund
- Dividend Yield

Hybrid MFs - Part 1

- Arbitrage Funds
- Conservative Hybrid
- Equity Saving

Hybrid MF- Part 2

- Dynamic Asset Allocation
- Multi Asset Allocation
- Balanced Hybrid
- Aggressive Hybrid

ProTool 2 - MFD Compliance Checklist

- Product Recommendations
- Documentation & Record Keeping
- Ethical & Best Practices

Program Curriculum & Schedule

Week 3 | 12 June 9:30 AM to 2:00 PM

Debt MFs - Part 1
- Overnight Fund
- Liquid funds
- Ultra Short Term
- Low Duration Fund
- Money Market Fund
- Short Duration Fund
- Floater Fund

Debt MFs - Part 2
- Medium Duration Fund
- Medium to Long Duration Fund
- Long Duration Fund
- Dynamic Bond Fund
- Gilt Fund with 10 year constant
- Target Maturity
- Fixed Maturity

Debt MFs - Part 3
- Credit Risk Fund
- Banking and PSU Fund
- Gilt Fund
- Corporate Bond Fund

ProTool 3 - MF Risk Profiling Tool
- Open-ended Questions to ask
- Risk Profiling Questionnaire
- Recommended Asset Allocation

Week 4 | 19 June 9:30 AM to 2:00 PM

Passive MFs
- Equity Index Funds
- Debt Index
- Gold & Silver ETFs
- Other ETFs

Solution MFs
- Retirement Fund
- Children's Fund
- Tax Saving (ELSS)

Upcoming & Others
- Fund of Funds
- Offshore Funds
- REITs / INVITs

ProTool 4 - MF Goal-based SIP Calculator
- Understand Client Needs
- Calculate MF Requirement
- Recommend SIP Amount & Category

Program Resources
- MF All-in-One Risk-O-Meter
- MF All-in-One Returns Performance
- Investor Awareness Program PPT Deck
- MFD Due Diligence Questionnaire

Program Master Trainers

Learn from the Masters & Leaders. We have invited the best in the industry i.e. senior most fund managers to be your trainers for the program.

Chirag Setalvad
CIO
HDFC Mutual Fund

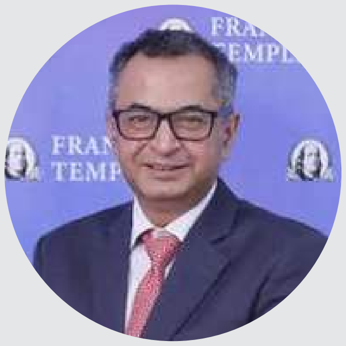
Harsha Upadhyay
CIO
Kotak Mutual Fund

Vinay Paharia
CIO
PGIM Mutual Fund

Manish Banthia
CIO - Fixed Income
ICICI Pru MF

Mahendra Jajoo
CIO - Fixed Income
Mirae (India) MF

Devang Shah
Head - Fixed Income
Axis Mutual Fund



Rahul Goswami
CIO - Debt
Franklin Mutual Fund

Suyash Choudhary
Head - Fixed Income
Bandhan MF

Anil Ghelani
Head - Passives
DSP Mutual Fund

Dinesh Balachandran
Head Equity
SBI Mutual Fund

Ashutosh B
Head - Equity Research
Nippon Mutual Fund

Sonam Udasi
Sr- Fund Manager
Tata Mutual Fund

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Program Fees & Benefits

Benefits	Non Members	ProMembers
Live Sessions	✓	✓
Recordings	✓ (1 Month)	✓ (1 year)
12 Quizzes		✓
4 ProTools		✓
4 Resources		✓
Certificate*		✓
	₹ 6,000	Free

** Certificate issued for ProMembers who attempt and pass the program quizzes*

Membership Fees
₹ 15,000

QPFP Qualified Personal Finance Professional®

QPFP Certificants will also be eligible to earn upto 12 Annual Continuous Education (ACE) points upon taking & clearing 12 quizzes of the program

What is NFP ProMembership?

NFP ProMembership helps you grow your career, practice or business continuously by helping you grow your competency & credibility which ultimately helps you grow your clients & your income. The annual membership includes below benefits along with multiple such UpSkill series running through the year.

NFP ProMembership Benefits

- UpSkills
- ProTools
- Exchange
- Resources
- Client Connect
- Quizzes
- Events
- Profile
- Directory

NFP Community Supporters

Major AMCs support NFP Initiatives and the community. The following Mutual Fund companies are part of this UpSkill Series on MF Categorization and Suitability

AXIS MUTUAL FUND

Bandhan Mutual Fund
Badhte Raho

kotak Mutual Fund

MIRAE ASSET Mutual Fund

DSP MUTUAL FUND

FRANKLIN TEMPLETON

Nippon india Mutual Fund
Wealth sets you free

PGIM India Mutual Fund

HDFC MUTUAL FUND
BHAROSA APNO KA

ICICI PRUDENTIAL MUTUAL FUND

SBI MUTUAL FUND
A PARTNER FOR LIFE

TATA MUTUAL FUND

By the end of this UpSkill Series, you'll be able to

- Recommend the right fund of 40+ MF Categories
- Navigate the Risk-Return Spectrum with Confidence
- Understand Product Suitability Regulatory Requirement
- Align Client Investment Goals with Categories
- Build Need based MF Portfolios for Clients

Leverage this practical knowledge to become an invaluable resource for your clients!

Join only this Program
for

₹ 6,000

OR

Join NFP ProMembership
& Get such Programs Free for 1 year

₹ 15,000

Scan to Register

https://nfp.li/MF-UpSkill-Series

To know more and become NFP ProMember contact :

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Minakshi Walawalkar

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