

Model Curriculum

Mutual Fund Agent

SECTOR: BFSI
SUB-SECTOR: FINANCIAL SERVICES
OCCUPATION: INVESTMENT SERVICES
REF ID: BSC/Q0601, Version No. 1.0
NSQF LEVEL: 4



Certificate

CURRICULUM COMPLIANCE TO QUALIFICATION PACK – NATIONAL OCCUPATIONAL STANDARDS

is hereby issued by the

BFSI SECTOR SKILLS COUNCIL OF INDIA

for the

MODEL CURRICULUM

Complying to National Occupational Standards of
Job Role/ Qualification Pack: **'Mutual Fund Agent'** QP No. **'BSC/Qo603 NSQF Level 4'**

Date of Issuance: December 22nd, 2015

Valid up to: December 22nd, 2016

* Valid up to the next review date of the Qualification Pack



Authorized Signatory
(BFSI Sector Skill Council of India)

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Mutual Fund Agent

CURRICULUM / SYLLABUS

This program is aimed at training candidates for the job of a “Mutual Fund Agent”, in the “BFSI” Sector/Industry and aims at building the following key competencies amongst the learner

Program Name	Mutual Fund Agent		
Qualification Pack Name & Reference ID. ID	BSC/Q0601		
Version No.	1.0	Version Update Date	15-01-2016
Pre-requisites to Training	STD. XII		
Training Outcomes	<p>After completing this programme, participants will be able to:</p> <ul style="list-style-type: none"> • Conduct research on mutual funds • Keep up to date on the mutual fund market • Approach and market various mutual funds schemes to prospective customer identified • Assist customer with determining most suitable mutual fund scheme according to needs • Receive approval for initiating purchase process • Assist customer with the application process for purchasing the mutual fund • Collect and ensure payments are processed at the bank/organization • Deliver proof of purchase and plan follow-up sessions • Develop long-term relationships with customers • Respond to customer queries and clarifications and advise the customers on existing product and new schemes • Assist in termination of investment 		

This course encompasses 4 out of 4 National Occupational Standards (NOS) of “Mutual Fund Agent” Qualification Pack issued by “BFSI Sector Skill Council of India”.

Sr. No.	Module	Key Learning Outcomes	Equipment Required
1	<p>Conduct Research</p> <p>Theory Duration (hh:mm) 10:00</p> <p>Practical Duration (hh:mm) 40:00</p> <p>Corresponding NOS Code N0601</p>	<ul style="list-style-type: none"> Update knowledge on mutual fund market Keep up to date on regulations and guidelines Impact of Macro Economic factors on mutual fund market 	White board, Marker, Overhead projector, Laptop, Internet access, Game card (snake & ladder)
2	<p>Market & Sell Mutual Fund</p> <p>Theory Duration (hh:mm) 10:00</p> <p>Practical Duration (hh:mm) 40:00</p> <p>Corresponding NOS Code N0602</p>	<ul style="list-style-type: none"> Approach and market various mutual funds schemes to prospective customer identified Assist customer with determining most suitable mutual fund scheme according to needs Receive approval for initiating purchase process 	White board, Marker, Overhead projector, Laptop, Internet access, Game card (snake & ladder)
3	<p>Assist with purchase of Mutual Fund</p> <p>Theory Duration (hh:mm) 10:00</p> <p>Practical Duration (hh:mm) 40:00</p> <p>Corresponding NOS Code N0603</p>	<ul style="list-style-type: none"> Assist customer with the application process for purchasing the mutual fund Collect and ensure payments are processed at the bank/organization Deliver proof of purchase and plan follow-up sessions 	White board, Marker, Overhead projector, Laptop, Internet access, Game card (snake & ladder)
4	<p>Perform After Sales Activities</p> <p>Theory Duration (hh:mm) 10:00</p> <p>Practical Duration (hh:mm) 40:00</p>	<ul style="list-style-type: none"> Develop long-term relationships with customers Respond to customer queries and clarifications and advise the customers on existing product and new schemes Assist in termination of investment 	White board, Marker, Overhead projector, Laptop, Internet access, Game card (snake & ladder)

Sr. No.	Module	Key Learning Outcomes	Equipment Required
	Corresponding NOS Code N0604		
	Total Duration Theory Duration 40:00 Practical Duration 160:00	Unique Equipment Required: NA	

Grand Total Course Duration: **200Hours, 0 Minutes**

(This syllabus/ curriculum has been approved by BFSI Sector Skill Council of India)

Trainer Prerequisites for Job role: “Mutual Fund Agent” mapped to Qualification Pack: “BSCQ/0601”

Sr. No.	Area	Details
1	Description	To deliver accredited training service, mapping to the curriculum detailed above, in accordance with the Qualification Pack “BSC / Q 0601”.
2	Personal Attributes	Aptitude for conducting training, and pre/ post work to ensure competent, employable candidates at the end of the training. Strong communication skills, interpersonal skills, ability to work as part of a team; a passion for quality and for developing others; well-organised and focused, eager to learn and keep oneself updated with the latest in the mentioned field.
3	Minimum Educational Qualifications	STD. XII
4a	Domain Certification	Certified for Job Role: “Mutual Fund Agent” mapped to QP: “BSC Q/0601”. Minimum accepted score as per SSC guideline is 70%.
4b	Platform Certification	Recommended that the Trainer is certified for the Job Role: “Trainer”, mapped to the Qualification Pack: “SSC/1402”. Minimum accepted score as per SSC guideline is 70%.
5	Experience	<ul style="list-style-type: none"> • Minimum 3 years’ experience as a trainer in the BFSI domain • Minimum 2 years’ experience as a trainer of Mutual Fund subjects Experience in mutual fund services a plus

Annexure: Assessment Criteria

Assessment Criteria	
Job Role	Mutual Fund Agent
Qualification Pack	BSCQ/0601
Sector Skill Council	BFSI

Sr. No.	Guidelines for Assessment
1	The assessment for the theory part will be based on knowledge bank of questions created by the SSC.
2	Individual assessment agencies will create unique question papers for theory part for each candidate at each examination/training centre.
3	Individual assessment agencies will create unique evaluations for skill practical for every student at each examination/training centre based on these criteria.
4	To pass the Qualification Pack, every trainee should score the minimum percentage assign to that job role, aggregate of theory and practical.
5	In each paper there will be 60 questions each though it's online or offline.
6	The assessor will be required to translate the questions from English to local language. And the VIVA also be conducted in English or local language as per their comfort.
7	VIVA will be conducted with Online as well as Offline exams.
8	Pass percentage for Mutual Fund Agent is 60

Assessable Outcome	Assessment Criteria	Total Mark	Out Of	Marks Allocation	
				Theory	Skills Practical
1. BSC / N 0601 (CONDUCT RESEARCH)	<ul style="list-style-type: none"> Update knowledge on mutual fund market Keep up to date on regulations and guidelines 	100	100	45	55
	Total		100	45	55
2. BSC / N 0602 (MARKET AND SELL MUTUAL FUNDS)	<ul style="list-style-type: none"> Approach and market various mutual funds schemes to prospective customer Identified Assist customer with determining most suitable mutual fund scheme according to needs Receive Approval for initiating purchase process 	100	100	30	70
	Total		100	30	70
4. BSC/N0604 (PERFORM AFTER SALES ACTIVITIES)	<ul style="list-style-type: none"> Develop Long-term relationships with customers Respond to Customer Queries and clarifications and advise the customers on existing product and new schemes Assist in termination of investment 	100	100	30	70
	Total		100	30	70
	Grand Total	300	300	105	195
	Percentage Weightage:			35 %	65%
	Minimum Pass% to qualify (aggregate):			60%	