

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

 <p>Skill India @Skill India - @Skill India</p>	 <p>BFSI BFSI Sector Skills Council of India</p>	 <p>N-S-D-C National Skill Development Corporation Transforming the skill landscape</p>
<h1>Certificate</h1>		
<h2>CURRICULUM COMPLIANCE TO QUALIFICATION PACK – NATIONAL OCCUPATIONAL STANDARDS</h2>		
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/Qo60a NSQF Level 4'		
Date of Issuance:	December 22 nd , 2015	 Authorized Signatory (BFSI Sector Skills Council of India)
Valid up to:	December 22 nd , 2018	
* Valid up to the next review date of the Qualification Pack		

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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.	BSC/Q0601		
Version No.	1.0	Version Update Date	18-12- 2015
Pre-requisites to Training	Minimum qualification – Class 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) 05:00</p> <p>Practical Duration (hh:mm) 15:00</p> <p>Corresponding NOS Code N 0601</p>	<ul style="list-style-type: none"> Update knowledge on mutual fund market Keep up to date on regulations and guidelines 	White board, Marker, Overhead projector, Laptop, Internet access
2	<p>Market and Sell Mutual Fund</p> <p>Theory Duration (hh:mm) 05:00</p> <p>Practical Duration (hh:mm) 15:00</p> <p>Corresponding NOS Code N 0602</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
3	<p>Assist with purchase of Mutual Fund</p> <p>Theory Duration (hh:mm) 10:00</p> <p>Practical Duration (hh:mm) 30:00</p> <p>Corresponding NOS Code N 0603</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
4	<p>Perform After Sales Activities</p> <p>Theory Duration (hh:mm) 10:00</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

	Practical Duration (hh:mm) 30:00 Corresponding NOS Code N 0604		
	Total Duration Theory Duration 30.00 Practical Duration 90.00	Unique Equipment Required:	

Grand Total Course Duration: 120 Hours00 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: “BSC/Q0601”

Sr. No.	Area	Details
1	Job 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	B.Com
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/Q1402”. Minimum accepted score as per SSC guideline is 70%.
5	Experience	Minimum 3years’ 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 for Mutual Fund Agent	
Job Role	Mutual Fund Agent
Qualification Pack	BSCQ/0601
Sector Skill Council	BFSI Sector Skill Council of India

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 exam is 60

				MARKS ALLOCATION	
ASSESSMENT OUTCOME (NOS CODE AND DESCRIPTION)	Assessment criteria (PC)	Total Marks	Out Of	Theory	Skills Practical
1. BSC / N 0601 (CONDUCT RESEARCH)	Update knowledge on mutualfund market Keep up to date on regulations and guidelines	100	100	30	70
		NOS Total	100	30	70
2. BSC / N 0602 (MARKET AND SELL MUTUAL FUNDS)	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
		NOS Total	100	30	70
3. BSC / N 0603 (ASSIST WITH PURCHASE OF MUTUAL FUNDS)	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	100	100	30	70
		NOS Total	100	30	70
4. BSC/N0604 (PERFORM AFTER SALES ACTIVITIES)	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	30	70
		NOS Total	100	30	70
		QP TOTAL	400	120	280



BFSI Sector Skill Council of India

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