

FINEDGE

Building Certified Professionals for Capital Markets & Wealth Management

Advanced, certification-led training programs designed to create industry-ready professionals for Stock Markets, Portfolio Management & Wealth Advisory roles.



SEBI Compliant | Industry Experts | Certification Focused | Career Support

Transform your future with practical, market-oriented financial education designed for real careers in capital markets.

About FINEDGE

FINEDGE is a specialised professional training institute dedicated exclusively to Stock Market Education, Wealth Management, and Portfolio Advisory.

We focus on developing certified, skilled, and industry-ready professionals who meet the expectations of India's rapidly evolving financial services sector.

Our programs bridge the gap between academic knowledge and real-world market practices, enabling learners to build long-term, successful careers in capital markets and wealth advisory roles.

Why Choose FINEDGE

- SEBI & NISM compliant programs
- Faculty with 10+ years of live market experience
- Certification-focused & job-oriented curriculum
- 70% practical training with real market exposure
- Live market simulations & case studies
- Resume building, interview preparation & placement support



Course Highlights

Certified Market Professional (CMP) Foundation Program in Stock Markets & Trading

The CMP program is designed to build **strong fundamentals in equity markets, derivatives, and trading strategies**, with a clear focus on practical application.



Who Should Enroll

- Fresh graduates●
- Aspiring traders & analysts●
- Entry-level capital market professionals●

Curriculum Coverage

- Capital Markets & Market Participants
- Equity Markets – Primary & Secondary
- Derivatives Markets – Futures & Options
- Technical Analysis – Indicators & Chart Patterns
- Fundamental Analysis – Financial Statements & Valuation Basics
- Trading Strategies & Risk Management
- Market Psychology & Trading Discipline
- SEBI Regulations & NISM Certification Overview

Practical Exposure

- Live market simulations
- Trading case studies
- Strategy testing & assignments

Duration: 12 Weeks

Career Opportunities

Dealer | Trader | Market Analyst | Equity Research Executive

Detailed Curriculum

MODULE 1: Financial Markets Foundation

- **Introduction to Financial Markets**
Structure & Participants of Capital Markets
- **Types of Financial Instruments**
Equity, Bonds, Derivatives, Commodities, Mutual Funds
- **Market Infrastructure**
Stock Exchanges, Depositories, Clearing & Settlement
- **Trading Mechanism**
Order Types, Trading Sessions, Settlement Cycles

MODULE 2: Technical Analysis

- **Chart Patterns**
Candlestick patterns, support & resistance, trends Market
- **Technical Indicators**
Moving averages, RSI, MACD, Bollinger Bands, Stochastic
- **Volume Analysis**
Price-volume relationship, accumulation/distribution
- **Trading Strategies**
Swing trading, positional trading, intraday strategies

MODULE 3: Fundamental Analysis

- **Financial Statement Analysis**
Balance sheet, P&L, cash flow statements, ratios
- **Company Valuation**
DCF, relative valuation, asset-based valuation
- **Industry Analysis**
Industry life cycles, competitive analysis, Porter's Five Forces
- **Economic Analysis**
Macroeconomic indicators, monetary policy, fiscal policy

MODULE 4: Derivatives & Risk Management

- **Futures & Options**
Pricing, strategies, Greeks, margin requirements
- **Option Strategies**
Straddle, strangle, spreads, covered calls, protective
- **Risk Management**
Value at Risk, stop losses, position sizing, portfolio hedging
- **Trading Psychology**
Emotional control, discipline, risk-reward mindset

Program Fee

₹45,000/- +GST

Certified Wealth Manager (CWM)

Professional Program in Wealth & Financial Advisory

The CWM program prepares professionals to manage **client wealth, portfolios, and long-term financial goals** with confidence and compliance.



Who Should Enroll

- Relationship Managers
- Financial Advisors
- Banking & Wealth Professionals
- Graduates aspiring for advisory careers

Curriculum Coverage

- Wealth Management Fundamentals
- Client Profiling & Risk Assessment
- Financial Planning Process
- Asset Allocation Models & Strategies
- Mutual Funds, Equities & Fixed Income Products
- Alternative Investments Overview
- Portfolio Construction & Periodic Review
- Ethical Advisory Practices & SEBI Compliance
- NISM Wealth Management Certifications

Practical Exposure

- Client-based case studies
- Portfolio construction exercises
- Advisory role-play simulations



Duration: 16 Weeks

Career Opportunities

Wealth Manager | Financial Advisor | Relationship Manager

Detailed Curriculum

Module 1: Client Profiling & Relationship Management

-Understanding Client Psychology

Behavioral finance, risk profiling, and client segmentation

-KYC & Compliance

AML guidelines, client onboarding, and regulatory requirements

-Relationship Building

Communication skills, trust building, and long-term client management

-Ethics in Wealth Management

Fiduciary responsibilities, conflict of interest, and ethical standards

Module 2: Financial Planning & Goal Setting

-Comprehensive Financial Planning

Cash flow analysis, net worth statement, and financial goal setting

-Retirement Planning

NPS, pension plans, retirement corpus calculation, and withdrawal strategies

-Education Planning

Child education funding, education loans, and education savings plans

-Tax Planning Strategies

Tax-efficient investments, deductions, exemptions, and tax planning tools

Module 3: Investment Products & Portfolio Management

-Equity Portfolio Construction

Stock selection, sector allocation, and equity portfolio strategies

-Debt & Fixed Income

Bonds, debentures, debt mutual funds, and fixed income strategies

-Alternative Investments

Real estate, private equity, hedge funds, commodities, and structured products

-Portfolio Rebalancing

Asset allocation strategies, performance monitoring, and rebalancing techniques

Module 4: Risk Management & Estate Planning

-Insurance Planning

Life insurance, health insurance, general insurance, and risk coverage assessment

-Estate Planning

Wills, trusts, succession planning, and wealth transfer strategies

-Regulatory Framework

SEBI regulations, RBI guidelines, and compliance requirements for wealth managers

-Wealth Management Technology

Digital platforms, robo-advisors, and technology tools for wealth management

Program Fee

₹55,000/- +GST

Course Highlights

Certified PMS Advisor (CPMS)

Advanced Program for Portfolio Management Services

CPMS is an advanced certification program designed for professionals aiming to work in **PMS firms, investment advisory businesses, and portfolio management roles.**

Who Should Enroll

-  Experienced finance professionals
-  Investment advisors
-  Portfolio analysts

Curriculum Coverage

- PMS Industry Structure & Business Models
- Client Onboarding & Compliance Requirements
- Advanced Portfolio Construction Techniques
- Equity Selection Frameworks
- Performance Measurement & Attribution Analysis
- Risk Management for PMS Portfolios
- Reporting, Review & Client Communication
- SEBI PMS Regulations
- Advanced NISM Certifications



Practical Exposure

- Real PMS portfolio case analysis
- Performance reporting exercises
- PMS strategy simulations

Duration: 14 Weeks

Career Opportunities

PMS Advisor | Portfolio Manager | Investment Advisor

Detailed Curriculum

Module 1: PMS Regulations & Framework

-SEBI PMS Regulations

Comprehensive understanding of SEBI (Portfolio Managers) Regulations, 2020

-Legal Framework

PMS agreements, client onboarding, KYC requirements, and compliance

-Risk Management Framework

Risk assessment, limits, monitoring, and reporting requirements for PMS

-Fee Structures

Management fees, performance fees, expense ratios, and fee transparency

Module 2: Portfolio Construction

-Asset Allocation Strategies

Strategic, tactical, and dynamic asset allocation for HNI portfolios

-Equity Portfolio Management

Stock selection, sector allocation, and equity portfolio construction

-Fixed Income Portfolios

Bond portfolio management, duration strategies, and credit analysis

-Alternative Investments

Real estate, private equity, and structured products in PMS portfolios

Module 3: Investment Strategies

-Growth vs Value Investing

Different investment philosophies and their application in PMS

-Quantitative Strategies

Algorithmic models, factor investing, and systematic strategies

-Thematic Investing

Sector-specific strategies, emerging themes, and trend-based investing

-Multi-Cap Strategies

Large-cap, mid-cap, and small-cap allocation strategies in PMS

Module 4: Operations & Performance

-Portfolio Monitoring

Real-time monitoring, rebalancing triggers, and position sizing

-Performance Measurement

Risk-adjusted returns, benchmarking, attribution analysis, and reporting

-Client Reporting

Monthly statements, performance reports, and client communication

-Technology in PMS

Portfolio management systems, trading platforms, and analytical tools

Program Fee

₹48,000/- +GST

Course Highlights

NISM

Certifications are Mandatory

Why Choose FINEDGE for NISM?

- **Highest Success Rate**

92% average pass rate with 95% first attempt success – highest in the industry

- **Expert Faculty**

Trainers with 15+ years industry experience and NISM certification expertise

- **Comprehensive Study Material**

Updated study material, chapter summaries, and 1000+ practice questions

- **Exam Registration Support**

Complete assistance with NISM exam registration, scheduling, and test center selection

Batch Duration

4 Weeks per Certification
Flexible Timings Available

Exam Dates

Multiple Dates Monthly
Online & Offline Exams

Corporate Training

Bulk Enrollments
Customized Schedules

Popular NISM Certifications

Series VIII

Equity Derivatives

NISM-Series-VIII: Equity Derivatives Certification Exam. Mandatory for equity derivatives sales personnel and approved users.

Exam Details:

- Duration: 2 hours
- Questions: 100 MCQs
- Passing: 60% marks
- Validity: 3 years

Series V-A

Mutual Fund Distributors

NISM-Series-V-A: Mutual Fund Distributors Certification Exam. Mandatory for mutual fund distributors and advisors.

Exam Details:

- Duration: 2 hours
- Questions: 100 MCQs
- Passing: 50% marks
- Validity: 3 years

Series X-A

Investment Adviser (Level 1)

NISM-Series-X-A: Investment Adviser (Level 1) Certification Exam. For individuals providing investment advice.

Exam Details:

- Duration: 2 hours
- Questions: 100 MCQs
- Passing: 60% marks
- Validity: 3 years

Series X-B

Investment Adviser (Level 2)

NISM-Series-X-B: Investment Adviser (Level 2) Certification Exam. Advanced certification for investment advisers.

Exam Details:

- Duration: 2 hours
- Questions: 100 MCQs
- Passing: 60% marks
- Validity: 3 years

Series III-A

Securities Intermediaries

NISM-Series-III-A: Securities Intermediaries Compliance Certification Exam. For compliance officers in securities market.

Exam Details:

- Duration: 2 hours
- Questions: 100 MCQs
- Passing: 60% marks
- Validity: 3 years

Series I

Currency Derivatives

NISM-Series-I: Currency Derivatives Certification Exam. For sales personnel and approved users of currency derivatives.

Exam Details:

- Duration: 2 hours
- Questions: 100 MCQs
- Passing: 60% marks
- Validity: 3 years

NISM

Enrollment & Fee Structure

Most Popular

Single Certification

₹8,500

Per Certification

- Complete Classroom Training
- Study Material & Workbook
- Chapter-wise Quizzes
- 3 Mock Tests
- Exam Registration Support

Combo Package (2)

₹15,000

Save ₹2,000

- Any 2 NISM Certifications
- Complete Study Material
- 5 Mock Tests Each
- Doubt Clearing Sessions
- Priority Exam Support

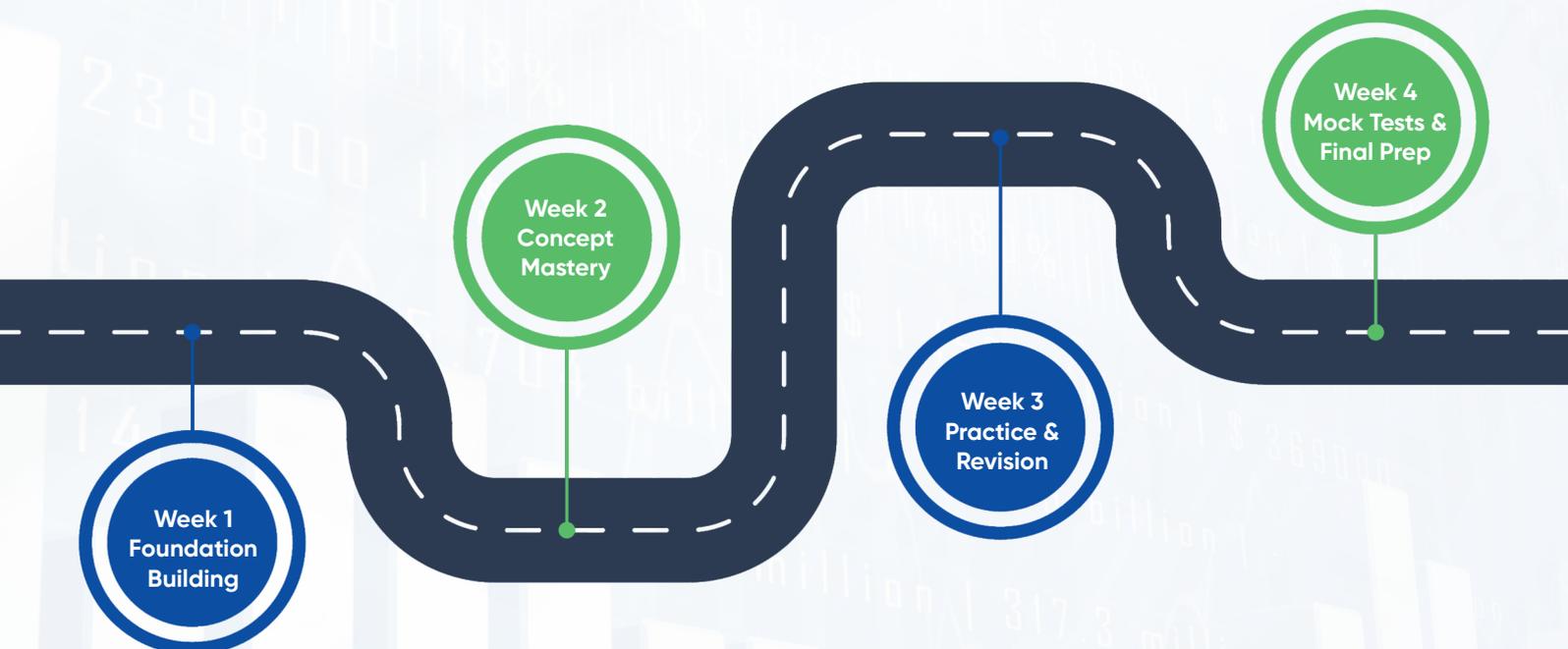
Premium Package (3+)

₹20,000

3 or More Certifications

- 3+ NISM Certifications
- Personalized Coaching
- Unlimited Mock Tests
- One-on-One Mentoring
- Career Guidance Support

Exam Preparation Roadmap



Career Support

- Resume & professional profile building
- Interview preparation & mock interviews
- Placement assistance
- Industry networking support

Our Achievements

2800+

Professionals
Trained

97%

Certification
Success Rate

85+

Industry Partners

15+

Years of
Excellence

Contact Us

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JOIN FINEDGE

Get Certified.

Build a Successful Capital Markets Career.

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