

your advantage

BANKEDGE
academy for banking and finance

EduEdge Pro

Finance | BFSI | Analytics | Data Science | Technology



Professional Certificate Program In Investment Banking Operations

www.bankedge.in

PCPIBO
PROFESSIONAL CERTIFICATE PROGRAM IN
INVESTMENT BANKING OPERATIONS

About THE PROGRAM

PROFESSIONAL CERTIFICATE PROGRAM IN INVESTMENT BANKING OPERATIONS

PCP - IBO program with a rigorous focus on Investment Banking Operations is widely considered as a gold standard in global Investment Banking and Investment Operations. It includes the prestigious Investment Banking Operations Certificate (IOC) from UK Charter body, Chartered Institute of Investments and Securities (CISI). IOC international certification has been approved by 50+ global regulators including UK FCA. IOC Certification would be provided by UK's Charter body CISI (Chartered Institute for Securities and Investments) and the training is delivered by EduEdgePro.

Many leading Investment Banks and Financial Institutions have mandated the IOC certification globally, as part of their domain requirements. Comprehensive training on IOC certification linked to placements, is exclusively offered by EduEdge Pro in India and globally, through the comprehensive PCP - IBO program, comprising of online, live synchronous, on-demand and self-paced learning modules.

PCP - IBO also includes modules on advanced domain knowledge in Investment Banking Operations, essential to being successful in the industry. Besides, we also cover comprehensive Excel and Financial Modelling training besides soft skills training, interview grooming and 100% placement assistance.

CAREER OUTCOMES



Learn domain knowledge related to Investment Banking, Risk Management and Investment Operations



Multi-asset class coverage



Online delivery. Start instantly and learn at your own schedule. Take UK certification exams online.



Placement Assistance



Access to 200+ e-Learning modules in Analytics, FinTech, Global Regulations and Capital Markets from UK CISI



Earn the prestigious ACSI designation that you can use after your name

What you will Learn ?

You will get an in-depth understanding of International Introduction To Securities And Investments, Global Securities Operations, Risk In Financial Services and other important domains within Investment Banking.

Besides, we will also teach you Financial Modelling using Excel, cover important concepts in Capital Markets and help prepare you for interviews in Investment Banking.

You will learn directly from industry experts, market practitioners, and seasoned finance professionals about Investment Banking, Investment Operations, Fund Administration, Financial Markets and Risk Management.

WHY THIS PROGRAM

**BECOME A DOMAIN
EXPERT**



**GET CERTIFIED BY UK
CHARTER BODY CISI**



**LINKED TO
PLACEMENTS IN
INVESTMENT
BANKING
OPERATIONS**



INTRODUCTION TO

your advantage
BANKEDGE
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ABOUT BANKEDGE

At BANKEDGE we call ourselves as a HUMAN CAPITAL RESOURCE ENTERPRISE. This is because, we primarily focus on the Training and Placement of competent Human Resources in the Banking, Financial Services and Insurance sector across India.

OUR STRENGTH

We specialize in providing modern, highly relevant and technology driven training and learning solutions for fresh graduates who aspire to make a career in banking sector.

OUR PRESENCE

Headquartered in the financial capital of India - Mumbai, we are a team of committed, intelligent and tech savvy professionals, who see great potential in India's banking and financial services sector.

OUR MISSION

Our core OBJECTIVE is to facilitate and ease the entry of every aspiring banker into this vertical, by offering a strategic mix of highly relevant training with emphasis on retail branch operations, soft skills, customer centricity and revenue generation/ business development tactics for the organization through various role plays, direct training, industrial visits, presentations and evaluations.

Over 50 organizations, including all major Private Sector Banks & Finance Companies trust BANKEDGE as their Training/Recruitment Partner.



INTRODUCTION TO

EduEdge Pro

Finance | BFSI | Analytics | Data Science | Technology



Executive Education Programs Offered to: Corporates

What do we offer

Our Executive Education Programs would offer corporates customized training solutions for their functional, technical, business and leadership requirements

Modes of Training

In-person and online delivery
(Instructor-led)

Outcomes

Enhance leadership skills, build foundations in general management, specialize in multi-disciplinary domains and build connections to a distinguished network of peers



Continual Professional Development Offered to: Individual professionals

What do we offer

Continual Professional Development programs and curriculum across domains such as BFSI, Fintech, Analytics, Data Science and Technology

Modes of Training

EdTech – Online
(Self-paced)

Outcomes

Seek to improve the life journey of those industry professionals wishing to upgrade themselves by helping them renew their purpose, build solid foundations and recalibrate their functional and technical learning curve



Industry Oriented Tracks Offered to: Universities

What do we offer

Certification programs, Industry tracks and industry-oriented workshops across BBA, BCom, B.Tech., PGDM/MBA, PGP programs

Modes of Training

In-person and online delivery
(Instructor-led)

Outcomes

As a powerhouse in Executive Education, we seek to bridge the gap between academic learning and industry requirements in Universities and educational institutions.

How our Training programs have gained wide acceptability across Corporates & Universities

70+

FUNCTIONAL TRAININGS

Our Functional training programs build domain expertise across areas such as BFSI, Fintech, Analytics, Data Science and Technology

50+

CORPORATE CLIENTS

Our illustrious clients include big 4 Consulting firms, Investment Banks, Commercial Banks, Mutual Funds, MNC conglomerates, Analytics firms, Technology companies, Exchanges and Regulators

20,000+

CORPORATE PARTICIPANTS

We have trained Consultants, BFSI specialists, Analytics managers, Investment Bankers, Commercial Bankers, Mutual Fund specialists, Technology teams and Data Scientists

25+

TECHNICAL TRAININGS

Our Technical training programs build practical expertise across industry-wise platforms such as Python, PowerBI, SQL, Hadoop, Bloomberg, Excel, etc

20+

UNIVERSITY CLIENTS

Our Technical training programs build practical expertise across industry-wise platforms such as Python, PowerBI, SQL, Hadoop, Bloomberg, Excel, etc

40,000+

UNIVERSITY STUDENTS

We have trained students from Undergraduate and Postgraduate programs such as BBA, BCOM, B.Eng., MBA, PGP and MSc

BECOME A DOMAIN EXPERT

PROGRAM CHAIR

DOMAIN KNOWLEDGE

A



MR. HARJEET SINGH

CFA, FRM, CAIA, PRM
 Stanford University (MS - Financial Mathematics)
 Entrepreneur-EdTech, FinTech
 Entrepreneur
 Financial Mathematician
 Hedge Fund / Algorithmic Trading Expert

01

PEDIGREE



MS, Financial Mathematics from Stanford University, US Holds International Charters-CFA, FRM, PRM, CAIA Holder of multiple scholarships - Ratan Tata, JN Tata, Prafulla Mukherji University topper - Bachelors of Engineering (Information Technology)

02

PROFESSIONAL EXPERIENCE



Global Markets experience on Wall Street, London and Amsterdam Worked with leading Investment Banks, Institutions & Consulting Firms Experience with Nomura, Merrill Lynch, Morgan Stanley, UBS, SCB Worked in Investment Management, Treasury, Quantitative Finance, Hedge Funds Founded and established own Asset Management company and hedge funds

03

TRAINING & CONSULTING EXPERIENCE



Consulted Ministry of Finance, GOI on Financial Markets policies and frameworks Consulted 10+ banks on areas in Investment Management & Risk Management Consulted NSE, MCX and SEBI in Algorithmic Trading & Financial Markets Trained 50+ corporates including MNCs, Investment Banks, Consulting firms, KPOs Conducted training for 100+ Financial Institutions in Financial Markets

04

ENTREPRENEURSHIP



Founder-Director, EduEdge Pro, an EdTech Initiative Introduced Industry-oriented tracks in India, an integrated curriculum into Universities Founder & Board Member, Stelios Asset Management Pvt. Ltd., a FinTech Initiative Runs India's first fully automated, algorithmic-driven SEBI-registered AIF CAT III India- focused Hedge Fund

Our faculty are domain-experts from the industry

Investment Banker
Credit Suisse

Asset Management
BlackRock

Consultant
EY

Commodities Head
MCX

Data Scientist
BOA-ML

Risk Manager
Nomura

Data Scientist
Dassault, Automation AI

Data Scientist
FirstCry

Technology Lead
TCS

Equity Research
Global Sachs

Middle Office Lead
UBS

Investment Banker
Deutsche Bank

Business Process Lead
Infosys

Data Scientist
Eaton Technology

Credit Manager
Standard Chartered

BECOME A DOMAIN EXPERT

DOMAIN
KNOWLEDGE

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LEARN FROM INDUSTRY EXPERTS

You will learn Investment Banking Operations from industry experts who are leading practitioners in their domains. You get hands-on industry perspective through their experience



PROGRAM CHAIR – STANFORD UNIVERSITY ALUMNUS

The program is helmed by Prof. Harjeet Singh, a Financial Mathematician from Stanford University and an Investment Management expert. He has extensive experience and knowledge of Investment Banking and Investment Management including Operations



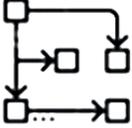
NETWORKING WITH INDUSTRY

You will be taught by industry practitioners working with leading investment banks and investment management firms. This presents a good opportunity for you to network with the industry and build your connections

BENEFITS OF INDUSTRY MENTORING

There are several benefits of engaging with Industry mentors and practitioners including learning the latest industry trends and latest analytics, learning critical domain knowledge and skill-sets, and understanding how Bloomberg can be optimally used

BECOME A DOMAIN EXPERT

1 Asset Enhancement	2 Asset Reporting	3 Asset Administration	4 Asset Processing
 <i>Securities Lending</i>	 <i>Reporting Valuation</i>	 <i>Fund Accounting</i>	 <i>Safekeeping</i>
 <i>Trade Execution</i>	 <i>Performance Analytics</i>	 <i>Trustee</i>	 <i>Settlement</i>
 <i>Cross-border Pooling</i>	 <i>Investment Accounting</i>	 <i>Transfer Agency</i>	 <i>Derivatives Processing</i>
 <i>Foreign Exchange</i>	 <i>Risk Monitoring Reporting</i>	 <i>Investment Operations Outsourcing</i>	 <i>Corporate Actions</i>
 <i>Cash Management</i>	 <i>Trade Execution Analysis</i>	 <i>Fund Administration</i>	 <i>Tax Reclamation</i>

DOMAIN KNOWLEDGE

A

BECOME A DOMAIN EXPERT

ASSET ENHANCEMENT

DOMAIN
KNOWLEDGE

A1

What is it?

Asset Enhancement involves providing enhanced asset services such as Securities Lending, Cash Management, Foreign Exchange and Pooling



Securities Lending

Securities lending is the act of loaning a stock, derivative or other security to an investor or firm.



Foreign Exchange

Foreign exchange operations include foreign exchange interventions, operations such as the sale of interest income derived from foreign reserve assets and "commercial transactions"



Cross-border Pooling

Companies with multi-location and multi-currency cash balances would typically prefer to concentrate and pool cash across regions and / or globally.



Trade Execution

Execution is the completion of an order to buy or sell a security in the market.



Cash Management

Cash management refers to a broad area of finance involving the collection, handling, and usage of cash. It involves assessing market liquidity, cash flow, and investments.

BECOME A DOMAIN EXPERT

ASSET REPORTING

DOMAIN
KNOWLEDGEA₂

What is it?

Asset Reporting constitutes amongst the most important domains in Investment Operations from a stakeholder as well as regulatory perspective



Reporting and Valuation

Covers complex areas such as Portfolio Valuation services, Purchase Price Allocation and Equity-based Compensation Valuation.



Performance Analytics

Provide accurate and cutting-edge performance analytics including reward-risk metrics, performance attribution and multi-asset class decompositions.



Investment Accounting

Accounting for Investments is widely used and deals with accounting for investments in financial statements prepared by a Company



Trade Execution Analysis

Trade evaluation measures the execution quality of the trade and the performance of the trader, broker, and/or algorithm used.



Risk Monitoring and Reporting

Review and conduct for regulatory and management purposes processes such as ongoing operational, reporting, monitoring, testing, and documentation processes

BECOME A DOMAIN EXPERT

ASSET ADMINISTRATION

DOMAIN
KNOWLEDGE

A³

What is it?

Asset Administration involves important processes for institutional funds such as Fund Accounting, Fund Administration, Trustee services and Transfer Agency



Fund Accounting

Fund accounting refers to the maintenance of the financial records of an investment fund.



Trustee

A trustee is a firm that holds and administers property or assets for the benefit of a third party.



Transfer Agency

A transfer agent is a financial services company that manages and keeps track of registered shareholders for companies/funds that issue issues.



Investment Operations Outsourcing

Investment outsourcing is the process whereby institutional investors engage a third party to manage all or a portion of their Investment operations.



Fund Administration

Review and conduct for regulatory and management purposes processes such as ongoing operational, reporting, monitoring, testing, and documentation processes

BECOME A DOMAIN EXPERT

ASSET PROCESSING

DOMAIN
KNOWLEDGE**A**₄

What is it?

Asset Processing involves processes related to Clearing and Settlement, Custody, Corporate Actions and Tax Reclaims



Safekeeping

A custodian or custodian bank is a financial institution that holds customers' securities for safekeeping to prevent them from being stolen or lost.



Settlement

Settlement is the actual exchange of money, or some other value, for the securities.



Derivatives Processing

This involves various processes related to Clearing and Settlement as well as Valuation of Derivatives transactions.



Corporate Actions

A corporate action is an event carried out by a company that materially impacts its stakeholders (e.g. shareholders or creditors).



Tax Reclamation

Processes involved when Refund arises since taxes paid are higher than your actual tax liability

BECOME A DOMAIN EXPERT

EXPOSURE TO MULTIPLE ASSET CLASSES

DOMAIN
KNOWLEDGE**A**

LEARN INVESTMENT OPERATIONS RELATED TO MULTIPLE ASSET CLASSES

Learn specific processes and domain-specifics related to multiple asset classes and their funds



EQUITY



FOREX



CREDIT



FIXED INCOME



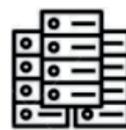
COMMODITIES

COLLECTIVE
INVESTMENT SCHEMES

MUTUAL FUNDS



HEDGE FUNDS

EXCHANGE TRADED
FUNDS (ETFs)

COURSE CURRICULUM

Part 1

International Markets & Securities

INVESTMENT BANKING & DIVISIONS

Introduction to Investment Banking | Business verticals of Investment Banks | Investment Banking Division | Global Markets Division | Types of Financial Markets, Different Market Participants & Regulatory Agencies | Buy Side vs Sell side | Asset Management Introduction | Research Introduction

EQUITIES MARKETS & INDICES

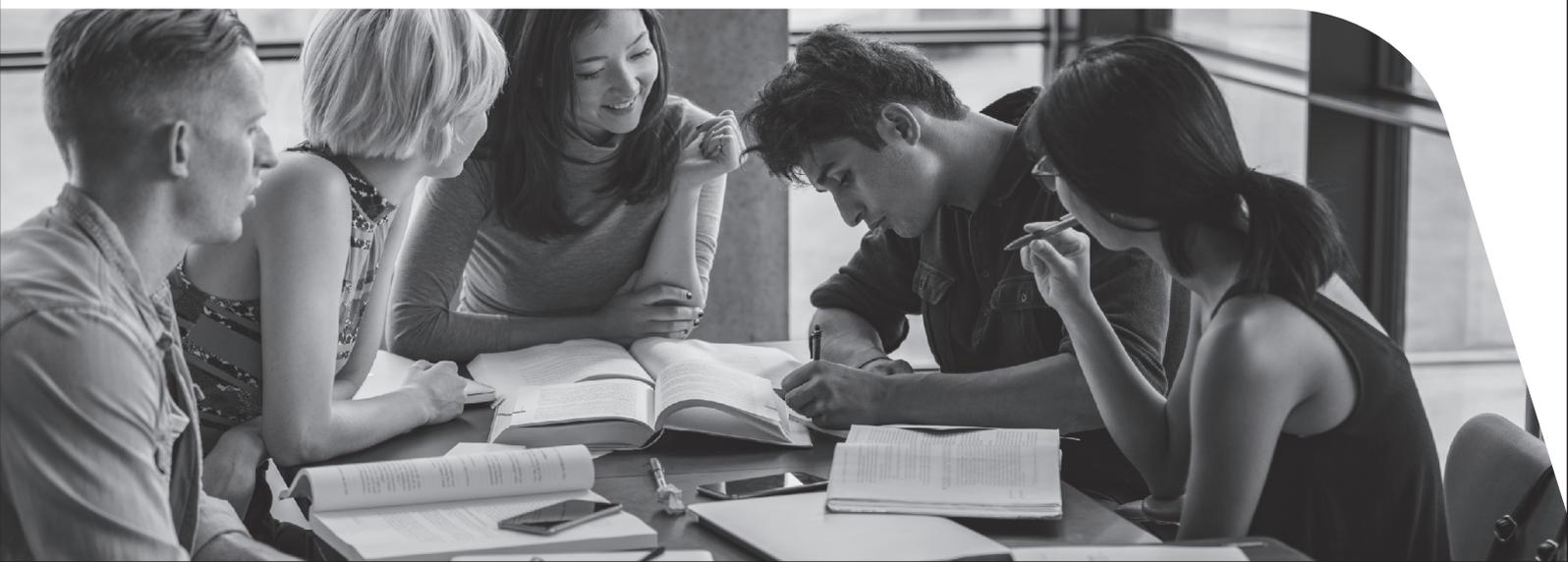
Stock Market Basics | Equity Securities | Global Stock Indices & Exchanges | Equity vs Preference Shares | Dividends & Corporate Actions | Depository Receipts – ADR & GDR | Primary & Secondary Markets | Issuance/Trading | IPO Process – US & Indian Markets | Global Financial Centres & Trading | Trading Mechanics | Stock-picking: Selecting fundamentally good stocks | Sectoral Analysis | Ranking stocks in a sector

FIXED INCOME SECURITIES & MARKETS

Fixed Income Basics | Types of Fixed Income Products | Yield & Yield Curve | Relation Between Interest Rate & Bond Price | Bond Pricing & Valuation | Optionality in Bonds – Callable vs Puttable | Clean price, Dirty Price, Accrued Interest | Measuring Interest Rate Risk | Duration & Convexity in a Bond | Bond spreads & OAS | Bond Portfolio | Credit Ratings | Securitization & products : MBS & ABS

MONEY MARKETS & INSTRUMENTS

Introduction to Money Markets | Difference between Capital & Money Markets | Instruments of Money Market | T-Bills, Certificate of Deposit, Commercial Paper, Repo, Reverse Repo & others | Conventions in Money Markets | Valuation of Money Market Instruments | Advantages & Disadvantages of Money Markets



COURSE CURRICULUM

Part 1

International Markets & Securities

FOREIGN EXCHANGE MARKETS & INSTRUMENTS

FX Basics & Markets | Types of Quotations | FX Products | Difference Between FX & Futures | Type of FX Trade - Cash, Spot, Tomm, NDF, Forward | Trade Economics of FX Transactions | Exchange Rate determinants | Currency Hedging | FX Arbitrage

DERIVATIVES MARKETS & PRODUCTS - 1

Derivatives - An Introduction | Difference between OTC & ET Derivatives | Forwards Contracts, Futures Contract | Valuation of Forwards & Futures contracts | Margins in Futures & Settlement | Futures & Forwards Payoffs | Definition of Options | Types of Options | Types of Option Payoffs | Options Pricing | Introduction to Swaps | Interest Rate Swap & mechanics | Valuation of IRS | FX Swap & mechanics | Credit Default Swap, Credit Events & mechanics | Default Probability Maths | Valuation of Swap Market Conventions

DERIVATIVES MARKETS & PRODUCTS - 2

Introduction to Swaps | Interest Rate Swap & mechanics | Valuation of IRS | FX Swap & mechanics | Credit Default Swap, Credit Events & mechanics | Default Probability Mathematics | Valuation of CDS | Basket Swap Products | Swap Market Conventions | CDOs | CDO Tranches | CMOs | Issues in Collateralized products & Credit Crisis

HEDGING USING SWAPS MARKETS & INSTRUMENTS

Interest Rate Swap & Hedging/Trading illustrations | FX Swaps & Hedging/Trading illustrations | Equity Swap & Hedging/Trading illustrations | Credit Default Swap & Hedging/Trading illustrations | Settlement Process of Swaps | Duration of Swaps | Hedging Ratios in Swaps | Hedging a Bond Portfolio with Swaps



COURSE CURRICULUM

Part 2

Investment Banking Operations & Processes

CORPORATE ACTIONS

What is Corporate Actions | Purpose of Corporate Action | Types of Corporate Actions | Dividends & types – cash, SCIP, DRIP | Bonus Issues | Rights | Stock Splits & Reverse Splits | Mergers, Demergers & Liquidations | Takeover & Exchanges | Convertible Bonds | Important Dates in Corporate Actions | Trade life Cycle in Corporate Action Events

TRADE LIFECYCLE

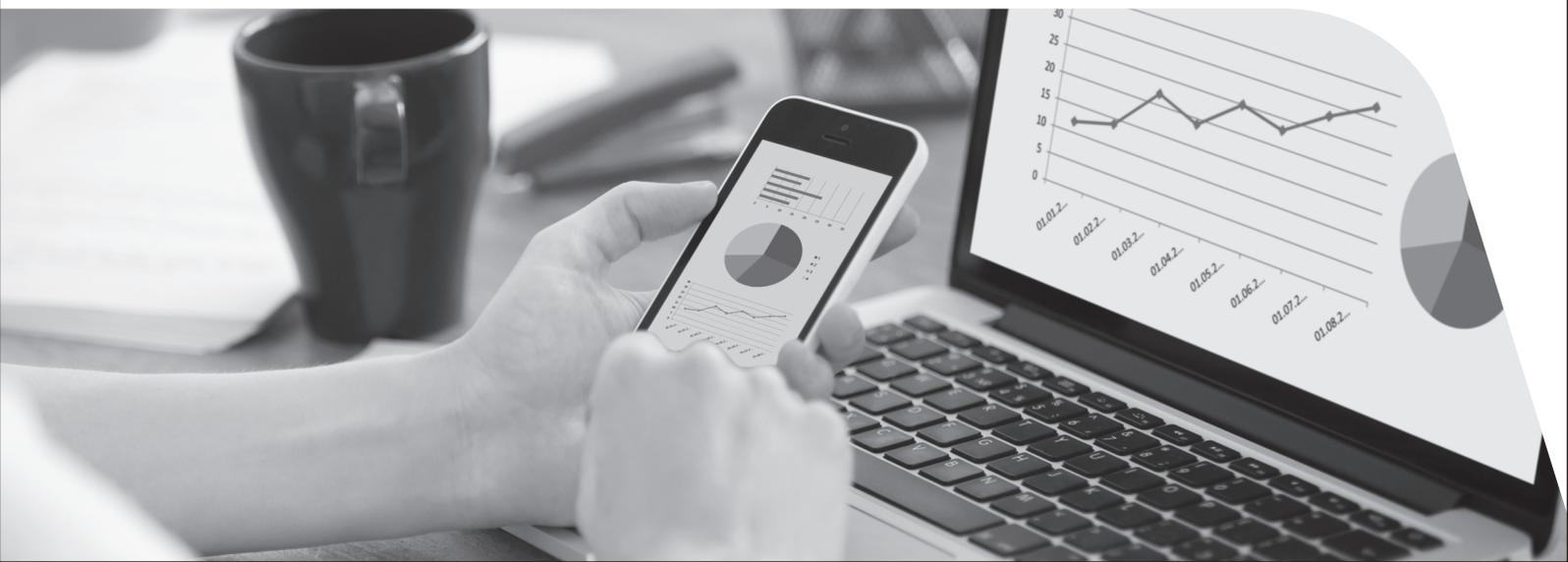
Structure of Front office, Middle office & Bank office | Overview of Trade Lifecycle | Participants involved in Trade Lifecycle | Trade Initiation & Order Placement | Order Routing and Execution | Trade Confirmation | Post-trade Processing | Clearing and Settlement | Trade Reconciliation | Trade Reporting

ADVANCED ASPECTS OF IB OPERATIONS

Custodial Services | Depositories | STP, FIX Protocol, SWIFT | Payment Systems | FZ Settlement | Failed Settlement | Safekeeping | Nominees | Cash Management | Securities Lending | Transfer Agency | NAV Calculations | Taxation

STOCK BORROWING & LENDING

Securities Lending & Borrowing | Market Participants of SBL | Securities Traded in SBL | Triplicate SBL | Stock Lending Difference from Repo | Reasons for SBL | Difference between SBL/SLB & Repo | Collateral | Types & Participants of Collateral Management | Process in Collateral Management | Key Terms in Collateral Management



COURSE CURRICULUM

Part 2

Investment Banking Operations & Processes

RECONCILIATION

Definition | Position within the TLC | Different Types of Reconciliations : Nostro, Depot, Trade, Exchange, Static Data, Intra, & Inter Recon | Life cycle of Typical Reconciliation Process | Risks Addressed by Reconciliation | Integrity of the Reconciliation Framework

REFERENCE DATA MANAGEMENT

Introduction to Reference Data Management | Securities Identification Numbers | Static Data | SWIFT, Markit and others | Instrument Set-up | Investor Set-up | SSI Set-up | Counter Party Identifiers | Other Reference Data Example

INTRODUCTION TO ISDA

ISDA Overview | Role of ISDA | Architecture | Hierarchy | ISDA Master Agreement | Provisions | Schedule | Various ISDA Documents | Derivative Products | ISDA Protocols | Credit Support Annex (CSA) | Confirmations | Best Practices



COURSE CURRICULUM

Part 3

SPECIALIZED TOPICS

IMPORTANT REGULATIONS

FATCA | GDPR | MIFID | MAR/MAD | UCITS | BASEL 2/2.5/3 | AML

KNOW YOUR CUSTOMER (KYC)

KYC Process | KYC requirements and procedures| Collecting customer information and verifying identities| Customer Due Diligence (CDD) | Different levels of due diligence based on risk assessment | KYC Documentation | Enhanced Due Diligence (EDD) | Extra measures taken for politically exposed persons (PEPs) and high-risk clients | Source of Funds and Source of Wealth (SOF/SOW) | Customer Identification Program (CIP)

ANTI-MONEY LAUNDERING (AML)

Money Laundering Definition and stages | AML Laws and Regulations | Risk-Based Approach (RBA) | Customer Risk Profiling | Transaction Monitoring and Analysis | Customer Due Diligence (CDD) | Politically Exposed Persons (PEPs) | Trade-Based Money Laundering (TBML) | Terrorist Financing | Suspicious Activity Reports (SARs) | Conducting AML audits and reviews

RISK MANAGEMENT

Principles of Risk Management | International Risk Regulation | Risk Identification and Assessment Framework | Metrics used in Risk Management – Value-at-Risk and Expected Shortfall | Operational Risk | Credit Risk | Market Risk | Value-at-Risk Models | Liquidity Risk | Corporate Governance and Risk Oversight | Model Risk |Enterprise Risk Management (ERM)

FUNDS & COLLECTIVE INVESTMENT SCHEMES

Introduction to Collective Investments | Open-Ended Funds | Close-Ended Funds | Tax-Efficient Savings | Mutual Funds | Hedge Funds | Private Equity and Venture Capital Funds | Tax Treatment of Collective Investments | Charges and Pricing of Collective Investments | NAV Calculations | Benchmarking | How Fund Managers pick Stocks



COURSE CURRICULUM

Final Frontier

FINANCIAL MODELLING | EXCEL | SOFT SKILLS | RESUME BUILDING | INTERVIEW PREPARATION

BASIC EXCEL

Basic of Excel | Important Excel Formulae | Look-up Functions | Aggregation Functions | Pivot Tables and Charts | Data Validations | Conditional Formatting | Graphs and Illustrations in Excel

ADVANCED EXCEL

Optimization in Excel | Scenario Analysis | Sensitivity Analysis | Advanced Pivots | Power Query Editor and Data Transformation/Cleaning in Excel | Power Pivots | Dashboarding through Excel/PowerBI| Introduction to Macros

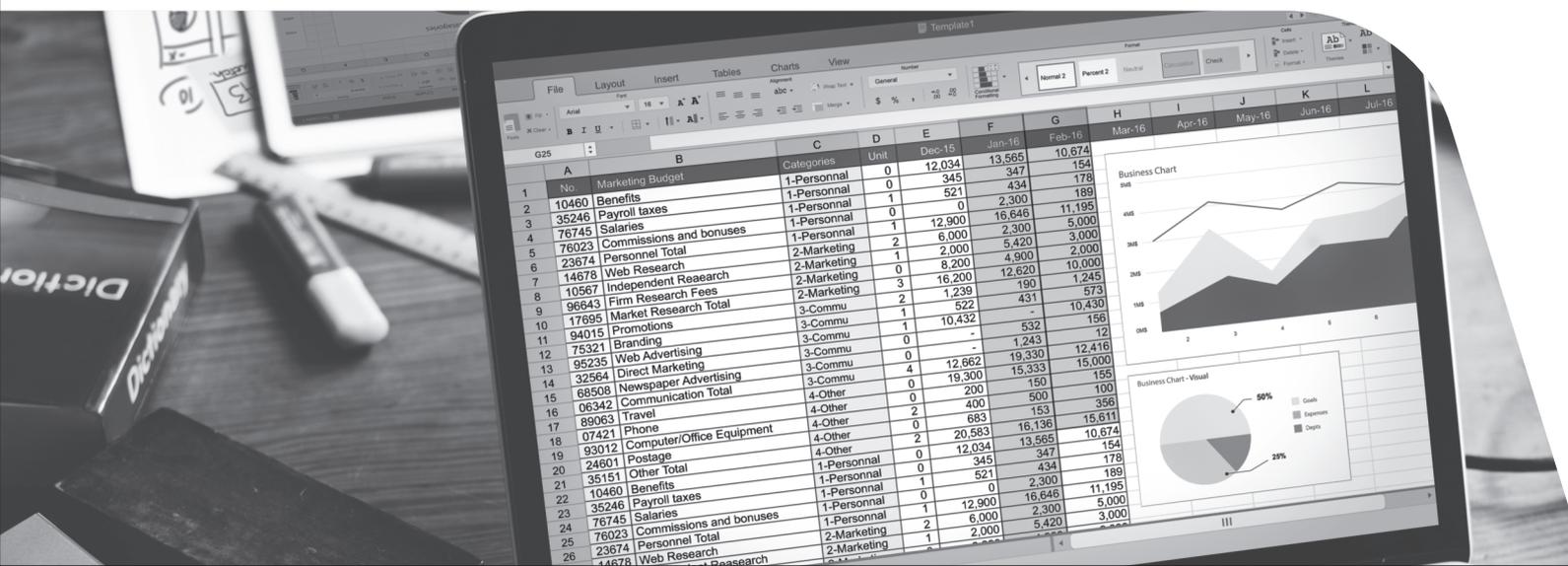
FINANCIAL MODELLING IN EXCEL

Projections in Excel | Valuation Models and Templates in Excel | DCF Modelling | FCFF/FCFE Modelling | Relative Valuation and Multiples | Transaction Multiples

SOFT SKILLS

Resume Building | Presentation Skills | Interpersonal Skills | Interview Preparation – Functional & Soft skills | Domain Mock Interviews | HR Mock Interviews

Part 4



UK CERTIFICATION



Why is IOC important

Investment Operations certificate (IOC) is recognized by UK regulator FCA, along with multiple regulators across the world. It has become the gold standard in international Investment Operations. IOC gives you a prestigious UK certificate, your entry door into global institutions and the pathway leads to the ACSI designation.

GET
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BY UK
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B

1 International qualification

The IOC is taken in over 50 countries, reflecting the global importance of operations and recognized by global regulators in important international financial jurisdictions

2 Recognized by the UK FCA

IOC features on the Financial Conduct Authority's Appropriate Qualification Tables as a suitable exam for those in a number of overseeing roles

3 Career development

Completing the IOC demonstrates professionalism, commitment to working in the industry and offers access to higher-level qualifications

4 Endorsed by the Financial Skills Partnership

The IOC is listed on the FSP's Qualifications List

5 Free CISI Student membership

Become associated with a chartered professional body and take advantage of an extensive range of benefits

6 ACSI designatory letters

ABOUT CISI



The CISI is the largest and most widely respected professional body for the securities and investment profession in the UK and in a growing number of financial centers globally.

CISI promotes the highest standards of professionalism amongst our members and the wider financial services profession and we believe professionalism is a blend of three elements – Knowledge, Skills and Behavior.

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IOC Offered by CISI

IOC is offered by the leading UK Charter body Chartered Institute for Securities and Investments (CISI)

Evolved
from London
Stock
Exchange

International
offices

Board of
Trustees

A Charity

A
Chartered
Professional
Body

170
staff

45,000
individual members
of which
20,000
are students

40,000
exams each year

10,000
publications

UK CERTIFICATION



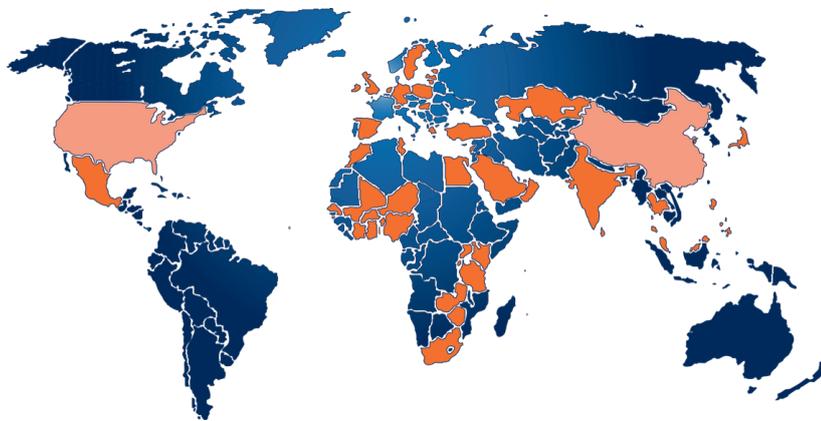
GLOBAL REGULATORY CONNECTIONS

Formal regulatory links in 50+ countries

The Investment Operations Certificate (IOC) offers practitioners the opportunity to specialize in the administration of investment funds and custody and settlement. It has been recognized by over 50+ countries as a gold standard in the Investment Banking Operations industry.

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Bahamas	Guinea-Bissau	Lebanon	Qatar	Turkey
Bahrain	Hong Kong	Lithuania	Romania	Thailand
Benin	India	Malaysia	Rwanda	Togo
Burkina Faso	Ireland	Mali	Saudi Arabia	UAE
China	Isle of Man	Malta	Senegal	Uganda
Côte-d'Ivoire	Jersey	Mauritius	Singapore	UK
Cyprus	Jordan	Mexico	South Africa	USA
Egypt	Kazakhstan	Morocco	Spain	Zambia
Estonia	Kenya	Netherlands	Sri Lanka	Zimbabwe
Ghana	Kuwait	Niger	Sweden	
Gibraltar	Labuan	Nigeria	Switzerland	
Greece	Laos	Oman	Tanzania	
Guernsey	Latvia	Palestine	Tunisia	

LINKED TO PLACEMENTS IN INVESTMENT BANKING OPERATIONS

CORPORATE RECOGNITION

Leading Investment banks, Investment houses and Technology firms recognize IOC

Within the profession, it is widely acknowledged as the most appropriate higher-level qualification for professionals wanting to pursue a career in investment operations.

Many corporates including leading investment banks, investment houses and technology firms officially recognize IOC and mandate it as part of higher learning objectives

LINKED TO
PLACEMENTS IN
INVESTMENT
BANKING
OPERATIONS



Morgan Stanley



NOMURA

J.P.Morgan

Infosys

HSBC 

Capgemini 

 RBS



BANK OF AMERICA 

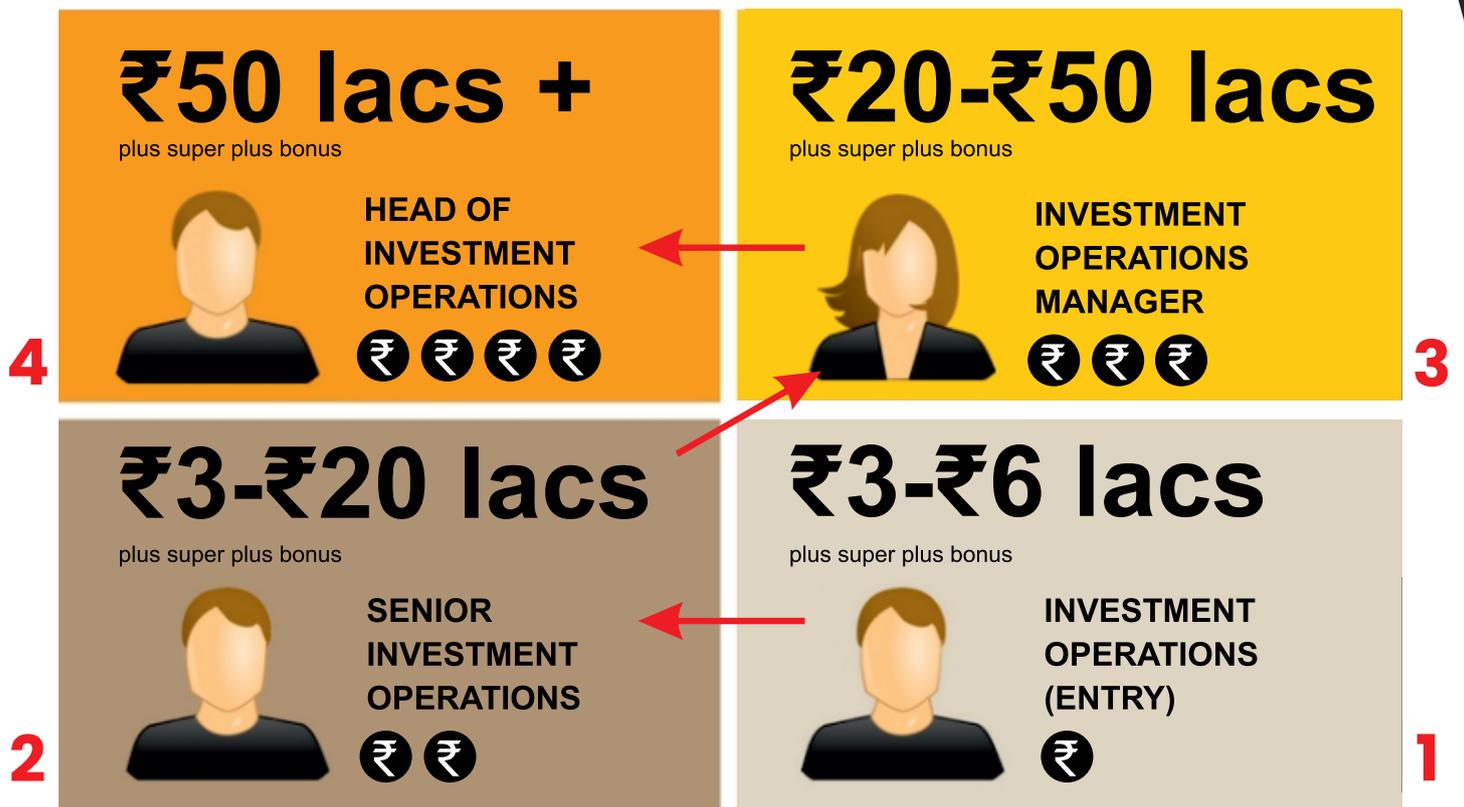
LINKED TO PLACEMENTS IN INVESTMENT BANKING OPERATIONS

CAREER PATH

Post PCPIBO program, you can expect a solid career path in Investment Banking and Investment Management Operations industry.

You will start your career in the domestic operations of these leading firms and will get opportunities to transition to international markets in 3-5 years in the Investment Operations onshore industry in UK, US, Singapore, etc.

LINKED TO
PLACEMENTS IN
INVESTMENT
BANKING
OPERATIONS



PCPIBO UK CERTIFICATE (IOC)



I. INTERNATIONAL INTRODUCTION TO SECURITIES AND INVESTMENTS

Understanding the fundamentals and important industry conventions of asset classes and financial markets



II. GLOBAL SECURITIES OPERATIONS

Learning the domain aspects of Clearing and Settlement, Corporate Actions and Asset Servicing



III. RISK IN FINANCIAL SERVICES

Learning the key aspects of Risk Management, Monitoring and Modeling including coverage of regulatory risk and latest regulations such as BASEL III

TRAINING

Yes

Yes

Yes

EXAMINATION**

Mandatory (included)

Voluntary

Voluntary

** conducted by CISI, UK Charter body



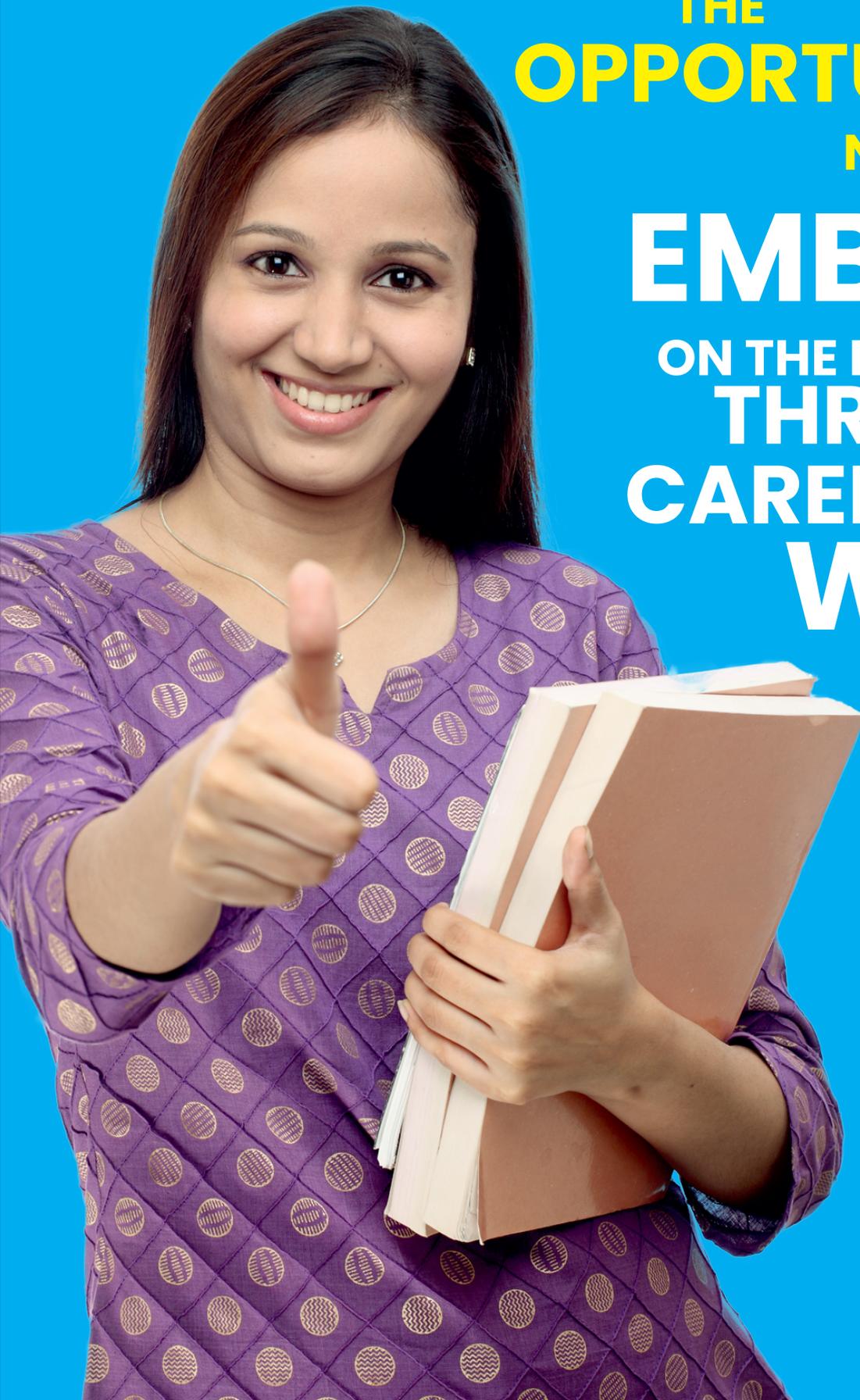
PROGRAM FAST FACTS

Mode of Delivery	Online
Training and Practice hours	125+ hours
Program Duration	3-4 Months
Practise Hours & Mock Test	Yes
LMS Support, Content & Notes	Would be provided
International UK Certificate	Included



SEIZE
THE
OPPORTUNITY
NOW AND

EMBARK
ON THE PATH TO A
THRIVING
CAREER
WITH
US



your advantage
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academy for banking and finance

EduEdge Pro

Finance | BFSI | Analytics | Data Science | Technology



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