



Frankfurt School  
of Finance & Management

German Excellence. Global Relevance

**ICICI direct**  
Centre for Financial Learning

# PREPARE FOR SUCCESS.

ICICIdirect Centre for Financial Learning &  
the Frankfurt School of Finance and Management bring you the  
**Certified Finance Expert** programme.





### **ABOUT ICICIdirect CENTRE FOR FINANCIAL LEARNING**

ICICIdirect Centre for Financial Learning is an initiative of ICICI Securities Ltd. set up with an objective of simplifying financial knowledge and increasing financial literacy. ICICIdirect Centre for Financial Learning is committed to lead the path to create next generation leaders who could catalyse the growth of financial markets in India, by expanding the pool of qualified and certified professionals for the industry.

ICICIdirect Centre for Financial Learning training programmes are categorised under Investment Education Programmes and Professional Certification & Development Programmes. The repository of domain knowledge includes a host of in-house developed seminars, workshops, certifications and training programmes leading to reputed certifications. These programmes are in the area of Stock Investing, Derivatives, Mutual Funds, Financial Planning, Wealth Management, Corporate Finance etc.

ICICIdirect Centre for Financial Learning has been conferred with the Award for Innovation in Learning and Best Online Learning Solution at the World Education Congress. It has also won the Emerging Brand Award at CMO Asia in Singapore.

More than 700,000 students, professionals and investors have acquired practical knowledge through various ICICIdirect Centre for Financial Learning programmes over the years.

### **ABOUT FRANKFURT SCHOOL OF FINANCE & MANGEMENT (FS)**

Frankfurt School of Finance & Management is a leading private business school based in Frankfurt am Main, Germany. FS has 86 regional education centres throughout Germany and various joint ventures and programmes abroad.

Frankfurt School of Finance & Management offers top-class degree courses and continuing education options in seven different programme divisions. FS maintains four specialist research centres and runs numerous international consulting projects. All educational, research and consulting activities are focused on finance and management. By finance, they mean cross-functional financial activities at all companies that deal with financial management. And by management, they mean classical corporate leadership, where managers deploy employees and resources in such a way that the company's goals are met as cost-effectively as possible.

## **ABOUT CERTIFIED FINANCE EXPERT (CFE)**

The Certified Finance Expert programme offers a comprehensive understanding of Research in Finance and aims to equip candidates with an extensive knowledge in the area of Financial Research and Financial Modeling, thereby creating highly skilled professionals in the area of Finance.

## **COMPOSITION**

This programme provides extensive knowledge to graduate students in the area of Finance, with a special focus on Financial Modeling and Research so that they can become industry-ready, to increase employability. It also provides extensive knowledge to a working professional in the area of finance, for a quick and smooth career progression.

This proposed programme is divided into two levels, with the first level focusing on offering extensive learning on Finance, and the second level focusing on Financial Research, Equity Research, Financial Modeling and Applied Accounting.

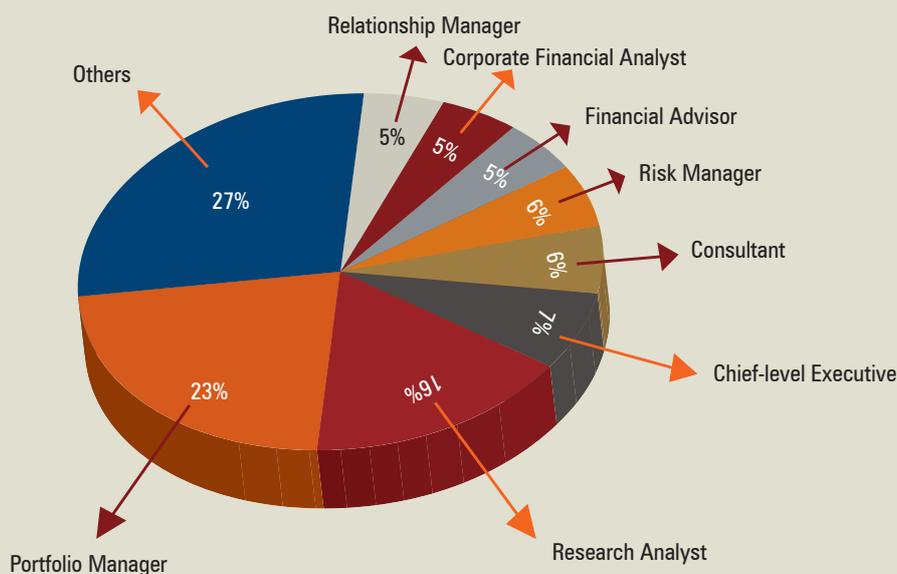
The programme will be taught over a period of eight months. It will include all the topics of Level I CFA® and other relevant content like Equity Research and Financial Modeling.



## CFA® EMPLOYMENT PROSPECTS:

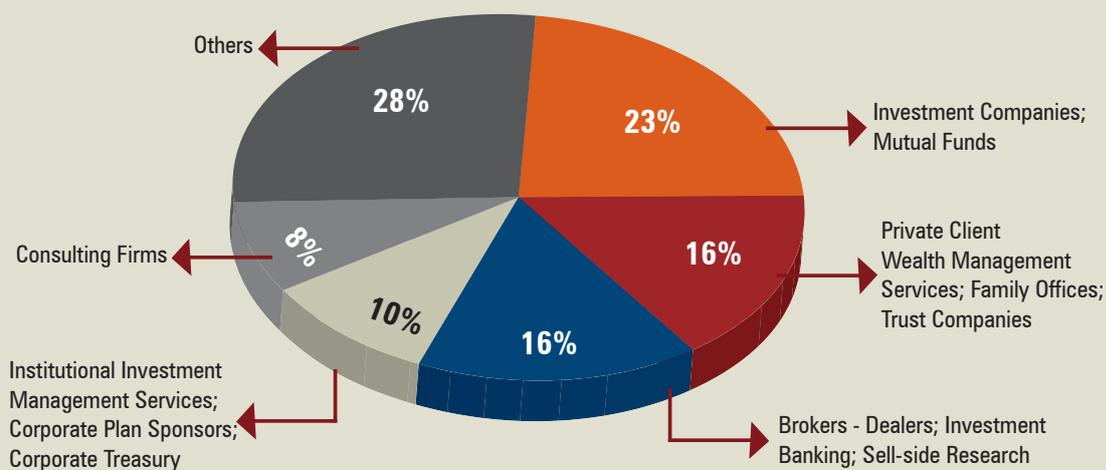
The CFA® programme equips you with the practical and fundamental knowledge you need for a wide variety of career choices in the investment profession. CFA® charterholders find that earning the CFA® charter provides them with a passport for working within numerous investment specialties and markets across the globe. It also equips them to change specialties as their careers evolve.

## TOP CFA® CHARTERHOLDERS OCCUPATION:



Source:  
As of January 2016.  
Job function is self-reported and not verified by CFA Institute. The 30% not displayed are in job functions with less than 5% of members each.

## WHO EMPLOYS CFA® CHARTERHOLDERS?



Source: As of January 2016. The above statistics are self-reported and not verified by CFA Institute.

## **WHO SHOULD ENROLL FOR CFE?**

- Graduates / Post Graduates and those pursuing graduation
- Working professionals at entry level roles who aspire to make a career in finance
- CA, CS, MBA (Finance) etc and those intending to gain deep insights in the application aspects of finance

## **TYPE OF JOB PROFILES FOR CFE**

The certification may help increase job prospects in the following areas:

- Valuations and Financial Modeling as required in research firms, KPOs, Brokerage Firms etc.
- Mid and back-office in banks, AMCs and different BFSI companies

## **EVALUATION PROCESS AND WEIGHTAGE**

- Attendance weightage is 25%
- Assignments weightage is 25%. The assignments and tests conducted during the training could be in the nature of online class-end tests and online assignments etc. The nature of tests could be objective or subjective and could be conducted in both classroom and online mode
- Term-end examination weightage is 50%. Frankfurt School will conduct the examination for both parts of the programme at the designated locations. The exam format would be online and the question paper would be in the MCQ format. The list of the designated centres will be published at all relevant places related to the programme information



## CERTIFICATION

On successful completion of the programme, a student would be awarded “Certified Finance Expert” certification offered by the Frankfurt School of Finance & Management in association with ICICIdirect Centre for Financial Learning as a Strategic Partner.

Note: It is compulsory for a student to pass the term-end examination conducted by Frankfurt School of Finance & Management for the Certification.

## PROGRAMME DELIVERY

The entire programme will be delivered through Online – mode. ICFL virtual classroom (V-Class) will be enabled with the technology whereby programme faculty or trainers will deliver the lectures from one or more studios. The students enrolled in the programme can attend the sessions from their home / office locations via any device like desktop, laptop, tablet or mobile as the programme is offered in direct to device (D2D) mode only.

## READING MATERIAL

- Print copy of classroom presentation
- Print copy of course material as per programme syllabus
- Online question bank
- eLearn content

## DETAILED PROGRAMME SYLLABUS

All the courses will be delivered in English and the learning and teaching method will be through Virtual Classroom and Online Recording.

PART A	PART B
<ul style="list-style-type: none"><li>• Quantitative Methods</li><li>• Financial Reporting and Analysis</li><li>• Corporate Finance</li><li>• Equity Investments</li><li>• Fixed Income</li><li>• Derivatives</li><li>• Alternative Investments</li><li>• Economics</li><li>• Portfolio Management and Wealth Planning</li><li>• Ethical and Professional Standards</li></ul>	<ul style="list-style-type: none"><li>• Overview of Equity Research</li><li>• Valuation Process</li><li>• Quantitative Analysis</li><li>• Introduction to Financial Modeling</li><li>• Financial Statement Modeling</li><li>• Investment Valuation Models</li></ul>

## TRAINER PROFILES:

### Mr. Ankur Kulshrestha:

Mr. Ankur Kulshrestha is a CFA® charter holder and a fellow member of the Institute of Chartered Accountant of India (ICAI). He completed his CA in 2005, wherein he secured All India Ranks in all three stages, a milestone rarely heard of in ICAI's 60-year history. He is a graduate from Shri Ram College of Commerce, Delhi University and also has an M.Com degree. He has 10 years of experience in academics. He is a much sought-after trainer for the CFA® Programme, his online sessions being wired in more than 15 countries. He is an empanelled trainer with the Reserve Bank of India and also a certified valuator with immense experience in the field of valuation specialisation in Mergers & Acquisitions. He has presented several white papers at different industry forums. He started his corporate career with Suzuki India through campus placement after his CA in 2005. He moved to one of the world's largest consulting organisations, E&Y, in 2009 specialising in automotive sector consulting, a role which gave him rich exposure of handling international clients on critical issues.

### Mr. Neeraj Gupta:

Mr. Neeraj Gupta has a BBA(H), MBA (Finance) and Level III CFA®. He has 9 years of professional experience in the banking & financial service industry, and in the financial education domain. He is currently associated as a corporate trainer with the Bombay Stock Exchange, National Stock Exchange, ICICI Securities Ltd., Centre for Investment Education and Learning, NJ Gurukul India Ltd., and is a Certified Trainer and Assessor in the BFSI Sector Skill Council for the Pradhan Mantri Kaushal Vikas Yojana (Skill India).



### **Mr. Makarand Bhopatkar:**

Mr. Makarand Bhopatkar has around 8 years of equity research and 16 years of financial training experience. After starting his career in equity research, he switched over to academic training by being associated with IBS Mumbai as faculty member. Later he ventured into professional financial training with Dun and Bradstreet India. He has conducted short-term training programmes in areas of Capital Markets, Treasury Products and Derivatives, Security Analysis and Valuation and Risk Management, for leading Indian and multinational banks, Mutual Funds, KPOs, BPOs and other corporate entities. He then joined a training firm in UAE, where his role was to impart finance training to employees of Sovereign Wealth Fund of Abu Dhabi. He is now an adjunct faculty and freelance finance trainer. He has a Bachelor of Commerce from Mumbai University and has completed CFA course from ICFAI India. He is also a CFA charter holder from CFA Institute, US. He has completed certification in Quantitative Finance from CQF Institute, UK and FRM certification from GARP.

## **TESTIMONIALS FROM CFE ENROLLED STUDENTS**

### **Arindam Saha, 6 years of experience in the manufacturing sector from Kolkata**

In the CFE programme, we have gathered knowledge on Quants, FRA, Equity, Portfolio Management, Corporate Finance, Fixed Income, Alternative Investments, Economics, Derivatives and Ethics. Our faculty taught us in a structured way and clarified all our doubts, which helped us understand the financial market better.

### **Anmol Dua, Student from Delhi**

It has been an amazing experience, where I got a chance to learn from various experts in finance. It's different from the usual classroom experience. The trainers have also shared real-life examples apart from the curriculum. The time invested has been worth it.

### **Chirag Talwar, Student from Delhi**

The CFE programme has given us the right exposure to the big online world. The time invested has been worth it. This programme is the need of the hour, in order to excel in the present phase of the financial field. Integration of theory with vast practical knowledge is the foundation for this extremely proficient programme.

#### **NOTE:**

- CFE is a certification granted by FS subject to fulfillment of eligibility and programme completion criteria
- CFE is a professional development certification, and FS grants alumni status to a student who passes the FS exam and gets a CFE certificate
- There is a provision of re-exam, if a student fails in the final examination taken by FS. However, it is subject to payment of re-examination fee to FS
- A student enrolled in the CFE programme, can get a 10% discount in other programmes offered by FS, under the executive education department
- It is mandatory to enrol with Frankfurt School of Finance and Management (FS), Germany along with ICICIdirect Centre for Financial Learning prior to the start of the programme lectures. ICFL holds the right to debar a student from attending the programme lectures if the student does not pay the examination fee of 400 EUR to FS before the start of the programme

## For more details call to ICFL Team

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