

Model Curriculum

Mutual Fund Agent

Mutual Fund Agent

SECTOR: **BFSI**
SUB-SECTOR: **Financial Services**
OCCUPATION: **Investment Services**
REFERENCE ID: **BSC/Q0601, Version No. 1.0**
NSQF LEVEL: **4**



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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	Theory Duration (hh:mm)	Practical Duration (hh:mm)	Key Learning Outcomes	Corresponding NOS Code	Equipment Required
1	Conduct Research	5	15	<ul style="list-style-type: none"> • Update knowledge on mutual fund market • Keep up to date on regulations and guidelines 	N 0601	White board, Marker, Overhead projector, Laptop, Internet access
2	Market and Sell Mutual Fund	5	15	<ul style="list-style-type: none"> • Approach and market various mutual funds schemes to 	N 0602	White board, Marker,



				<p>prospective customer identified</p> <ul style="list-style-type: none"> Assist customer with determining most suitable mutual fund scheme according to needs Receive approval for initiating purchase process 		Overhead projector, Laptop, Internet access
3	Assist with purchase of Mutual Fund	10	30	<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 	N 0603	White board, Marker, Overhead projector, Laptop, Internet access
4	Perform After Sales Activities	10	30	<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 	N 0604	White board, Marker, Overhead projector, Laptop, Internet access

Total Duration:	<u>30</u>	<u>90</u>	Unique Equipment Required:
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Grand Total Course Duration: **120 Hours 00 Minutes**

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



Annexure1: 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

ASSESSMENT OUTCOME (NOS CODE AND DESCRIPTION)	Assessment criteria (PC)	Total Marks	Out Of	MARKS ALLOCATION	
				Theory	Skills Practical
1. BSC /N 0601 (CONDUCT RESEARCH)	Update knowledge on mutual fund 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



Annexure2: 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 <u>“BSC / Q 0601”</u> .
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: <u>“Mutual Fund Agent”</u> mapped to QP: <u>“BSC / Q 0601”</u> . Minimum accepted score as per SSC guideline is 70%.
4b	Platform Certification	Recommended that the Trainer is certified for the Job Role: <u>“Trainer”</u> , mapped to the Qualification Pack: <u>“SSC/1402”</u> . Minimum accepted score as per SSC guideline is 70%.
5	Experience	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



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/Qo602 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)



BFSI Sector Skill Council of India

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