

Qualification Pack



MIS Data Analyst -Financial Services

QP Code: BSC/Q4101

Version: 1.0

NSQF Level: 4

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BSC/Q4101: MIS Data Analyst -Financial Services

Brief Job Description

The job requires the individual to gather, assimilate, evaluate, analyze, and process an organization's data to produce meaningful and useful information based on which the management can take decisions to ensure future growth of the organization.

Personal Attributes

The individual at work should have analytical, problem-solving and good logical skills with an ability to perform under pressure.

Applicable National Occupational Standards (NOS)

Compulsory NOS:

1. [BSC/N4101: Perform data analysis using MS-Excel](#)
2. [DGT/VSQ/N0102: Employability Skills \(60 Hours\)](#)

Qualification Pack (QP) Parameters

Sector	BFSI
Sub-Sector	BFSI Processing, Broking, Fund Investment & Services, Lending, Payments
Occupation	Operations
Country	India
NSQF Level	4
Credits	15.8
Aligned to NCO/ISCO/ISIC Code	NCO-2015/NIL

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Minimum Educational Qualification & Experience	12th Class (pass) with 6 Months of experience relevant work experience OR 10th Class + I.T.I with 2 Years of experience after Class 10th OR 10th Class (pass) OR Completed 3-year diploma (after 10th) OR Previous relevant Qualification of NSQF Level (level 3) with 2 Years of experience relevant work experience
Minimum Level of Education for Training in School	10th Class
Pre-Requisite License or Training	NA
Minimum Job Entry Age	18 Years
Last Reviewed On	NA
Next Review Date	30/06/2025
NSQC Approval Date	30/06/2022
Version	1.0
Reference code on NQR	2022/BFSI/BFSISSC/06063
NQR Version	1

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BSC/N4101: Perform data analysis using MS-Excel

Description

This OS unit is about collecting the data, analyzing it, and generating reports as required by the management.

Scope

The scope covers the following :

- Collect and analyze the data
- Assist management in business analysis

Elements and Performance Criteria

Collect and analyze the data

To be competent, the user/individual on the job must be able to:

- PC1.** collect data from various departments and systems
- PC2.** categorize the data based on its characteristics, application and management hierarchy
- PC3.** provide support and maintenance to existing management information systems
- PC4.** organize the data in the specified formats
- PC5.** perform various excel functions and formulas to create meaningful information
- PC6.** prepare various charts and tables to analyze the information as required by the management
- PC7.** produce daily, weekly and monthly MIS reports
- PC8.** analyze the data through extensive usage of MS Excel (Aggregate function, Vlookup & Hlookup, Pivot table, Index, Dashboards), VBA, Dashboard Reports, Macros, etc.
- PC9.** perform data analysis for generating reports
- PC10.** generate both periodic and ad hoc reports as needed in the specified format
- PC11.** prepare presentations, graphs and analytical reports as required by the management
- PC12.** maintain thorough understanding of information and data sources
- PC13.** identify the opportunities of automating the reports, snapshots and dashboards using advanced formulae, Macros, VB and other techniques
- PC14.** automate and schedule report generation

Assist management in business analysis

To be competent, the user/individual on the job must be able to:

- PC15.** report on operational metrics, conduct data and business analysis, and present summary of findings to management in a clear, concise, convincing, and actionable format
- PC16.** assist in volume forecast and capacity planning as needed
- PC17.** generate income and expenditure budget reports to equip management to take decisions in time
- PC18.** prepare cost, variance and profitability factors and value driver reports, as required by the management

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- PC19.** generate and distribute management reports in accurate and timely manner
- PC20.** provide recommendations to update current MIS to improve reporting efficiency and consistency
- PC21.** provide strong reporting and analytical information support to management team
- PC22.** analyze business information to identify process improvements for increasing business efficiency and effectiveness
- PC23.** maintain a status on all projects and proactively communicate with management
- PC24.** prepare and update monthly KPI data to support management in taking operational decisions
- PC25.** generate and maintain day to day sales data and update the management
- PC26.** develop and execute data-based experiments to increase efficiency of decision making based on the results

Knowledge and Understanding (KU)

The individual on the job needs to know and understand:

- KU1.** data collection techniques
- KU2.** basic MS excel concepts
- KU3.** MS- Excel formulae and functions like Vlookup, Hlookup, cell referencing, etc.
- KU4.** dashboard creation process
- KU5.** procedure to follow automated steps
- KU6.** analyze the data using various tools in MS-Excel
- KU7.** process to automate the process of reporting
- KU8.** working procedure of recording the VBA coding
- KU9.** procedure to prepare various report as per the requirements
- KU10.** procedure to create formats for various reports

Generic Skills (GS)

User/individual on the job needs to know how to:

- GS1.** read and interpret instructions, procedures, and information at the workplace
- GS2.** write summary and reports
- GS3.** communicate effectively with the superior and various departments
- GS4.** complete tasks efficiently and accurately within stipulated time
- GS5.** analyze and organize the data
- GS6.** take decisions in a time bound manner
- GS7.** improve and modify own work practices

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Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>Collect and analyze the data</i>	40	70	-	-
PC1. collect data from various departments and systems	-	-	-	-
PC2. categorize the data based on its characteristics, application and management hierarchy	-	-	-	-
PC3. provide support and maintenance to existing management information systems	-	-	-	-
PC4. organize the data in the specified formats	-	-	-	-
PC5. perform various excel functions and formulas to create meaningful information	-	-	-	-
PC6. prepare various charts and tables to analyze the information as required by the management	-	-	-	-
PC7. produce daily, weekly and monthly MIS reports	-	-	-	-
PC8. analyze the data through extensive usage of MS Excel (Aggregate function, Vlookup & Hlookup, Pivot table, Index, Dashboards), VBA, Dashboard Reports, Macros, etc.	-	-	-	-
PC9. perform data analysis for generating reports	-	-	-	-
PC10. generate both periodic and ad hoc reports as needed in the specified format	-	-	-	-
PC11. prepare presentations, graphs and analytical reports as required by the management	-	-	-	-
PC12. maintain thorough understanding of information and data sources	-	-	-	-
PC13. identify the opportunities of automating the reports, snapshots and dashboards using advanced formulae, Macros, VB and other techniques	-	-	-	-
PC14. automate and schedule report generation	-	-	-	-

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Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>Assist management in business analysis</i>	30	60	-	-
PC15. report on operational metrics, conduct data and business analysis, and present summary of findings to management in a clear, concise, convincing, and actionable format	-	-	-	-
PC16. assist in volume forecast and capacity planning as needed	-	-	-	-
PC17. generate income and expenditure budget reports to equip management to take decisions in time	-	-	-	-
PC18. prepare cost, variance and profitability factors and value driver reports, as required by the management	-	-	-	-
PC19. generate and distribute management reports in accurate and timely manner	-	-	-	-
PC20. provide recommendations to update current MIS to improve reporting efficiency and consistency	-	-	-	-
PC21. provide strong reporting and analytical information support to management team	-	-	-	-
PC22. analyze business information to identify process improvements for increasing business efficiency and effectiveness	-	-	-	-
PC23. maintain a status on all projects and proactively communicate with management	-	-	-	-
PC24. prepare and update monthly KPI data to support management in taking operational decisions	-	-	-	-
PC25. generate and maintain day to day sales data and update the management	-	-	-	-
PC26. develop and execute data-based experiments to increase efficiency of decision making based on the results	-	-	-	-
NOS Total	70	130	-	-



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National Occupational Standards (NOS) Parameters

NOS Code	BSC/N4101
NOS Name	Perform data analysis using MS-Excel
Sector	BFSI
Sub-Sector	Lending, Fund Investment & Services, Payments, Broking
Occupation	Operations
NSQF Level	4
Credits	13.8
Version	1.0
Last Reviewed Date	NA
Next Review Date	30/06/2025
NSQC Clearance Date	30/06/2022

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DGT/VSQ/N0102: Employability Skills (60 Hours)

Description

This unit is about employability skills, Constitutional values, becoming a professional in the 21st Century, digital, financial, and legal literacy, diversity and Inclusion, English and communication skills, customer service, entrepreneurship, and apprenticeship, getting ready for jobs and career development.

Scope

The scope covers the following :

- Introduction to Employability Skills
- Constitutional values - Citizenship
- Becoming a Professional in the 21st Century
- Basic English Skills
- Career Development & Goal Setting
- Communication Skills
- Diversity & Inclusion
- Financial and Legal Literacy
- Essential Digital Skills
- Entrepreneurship
- Customer Service
- Getting ready for Apprenticeship & Jobs

Elements and Performance Criteria

Introduction to Employability Skills

To be competent, the user/individual on the job must be able to:

- PC1.** identify employability skills required for jobs in various industries
- PC2.** identify and explore learning and employability portals

Constitutional values - Citizenship

To be competent, the user/individual on the job must be able to:

- PC3.** recognize the significance of constitutional values, including civic rights and duties, citizenship, responsibility towards society etc. and personal values and ethics such as honesty, integrity, caring and respecting others, etc.
- PC4.** follow environmentally sustainable practices

Becoming a Professional in the 21st Century

To be competent, the user/individual on the job must be able to:

- PC5.** recognize the significance of 21st Century Skills for employment
- PC6.** practice the 21st Century Skills such as Self-Awareness, Behaviour Skills, time management, critical and adaptive thinking, problem-solving, creative thinking, social and cultural awareness, emotional awareness, learning to learn for continuous learning etc. in personal and professional life

Basic English Skills

To be competent, the user/individual on the job must be able to:

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- PC7.** use basic English for everyday conversation in different contexts, in person and over the telephone
- PC8.** read and understand routine information, notes, instructions, mails, letters etc. written in English
- PC9.** write short messages, notes, letters, e-mails etc. in English

Career Development & Goal Setting

To be competent, the user/individual on the job must be able to:

- PC10.** understand the difference between job and career
- PC11.** prepare a career development plan with short- and long-term goals, based on aptitude

Communication Skills

To be competent, the user/individual on the job must be able to:

- PC12.** follow verbal and non-verbal communication etiquette and active listening techniques in various settings
- PC13.** work collaboratively with others in a team

Diversity & Inclusion

To be competent, the user/individual on the job must be able to:

- PC14.** communicate and behave appropriately with all genders and PwD
- PC15.** escalate any issues related to sexual harassment at workplace according to POSH Act

Financial and Legal Literacy

To be competent, the user/individual on the job must be able to:

- PC16.** select financial institutions, products and services as per requirement
- PC17.** carry out offline and online financial transactions, safely and securely
- PC18.** identify common components of salary and compute income, expenses, taxes, investments etc
- PC19.** identify relevant rights and laws and use legal aids to fight against legal exploitation

Essential Digital Skills

To be competent, the user/individual on the job must be able to:

- PC20.** operate digital devices and carry out basic internet operations securely and safely
- PC21.** use e- mail and social media platforms and virtual collaboration tools to work effectively
- PC22.** use basic features of word processor, spreadsheets, and presentations

Entrepreneurship

To be competent, the user/individual on the job must be able to:

- PC23.** identify different types of Entrepreneurship and Enterprises and assess opportunities for potential business through research
- PC24.** develop a business plan and a work model, considering the 4Ps of Marketing Product, Price, Place and Promotion
- PC25.** identify sources of funding, anticipate, and mitigate any financial/ legal hurdles for the potential business opportunity

Customer Service

To be competent, the user/individual on the job must be able to:

- PC26.** identify different types of customers
- PC27.** identify and respond to customer requests and needs in a professional manner.

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PC28. follow appropriate hygiene and grooming standards

Getting ready for apprenticeship & Jobs

To be competent, the user/individual on the job must be able to:

PC29. create a professional Curriculum vitae (Résumé)

PC30. search for suitable jobs using reliable offline and online sources such as Employment exchange, recruitment agencies, newspapers etc. and job portals, respectively

PC31. apply to identified job openings using offline /online methods as per requirement

PC32. answer questions politely, with clarity and confidence, during recruitment and selection

PC33. identify apprenticeship opportunities and register for it as per guidelines and requirements

Knowledge and Understanding (KU)

The individual on the job needs to know and understand:

KU1. need for employability skills and different learning and employability related portals

KU2. various constitutional and personal values

KU3. different environmentally sustainable practices and their importance

KU4. Twenty first (21st) century skills and their importance

KU5. how to use English language for effective verbal (face to face and telephonic) and written communication in formal and informal set up

KU6. importance of career development and setting long- and short-term goals

KU7. about effective communication

KU8. POSH Act

KU9. Gender sensitivity and inclusivity

KU10. different types of financial institutes, products, and services

KU11. how to compute income and expenditure

KU12. importance of maintaining safety and security in offline and online financial transactions

KU13. different legal rights and laws

KU14. different types of digital devices and the procedure to operate them safely and securely

KU15. how to create and operate an e- mail account and use applications such as word processors, spreadsheets etc.

KU16. how to identify business opportunities

KU17. types and needs of customers

KU18. how to apply for a job and prepare for an interview

KU19. apprenticeship scheme and the process of registering on apprenticeship portal

Generic Skills (GS)

User/individual on the job needs to know how to:

GS1. read and write different types of documents/instructions/correspondence

GS2. communicate effectively using appropriate language in formal and informal settings



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- GS3.** behave politely and appropriately with all
- GS4.** how to work in a virtual mode
- GS5.** perform calculations efficiently
- GS6.** solve problems effectively
- GS7.** pay attention to details
- GS8.** manage time efficiently
- GS9.** maintain hygiene and sanitization to avoid infection

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Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>Introduction to Employability Skills</i>	1	1	-	-
PC1. identify employability skills required for jobs in various industries	-	-	-	-
PC2. identify and explore learning and employability portals	-	-	-	-
<i>Constitutional values - Citizenship</i>	1	1	-	-
PC3. recognize the significance of constitutional values, including civic rights and duties, citizenship, responsibility towards society etc. and personal values and ethics such as honesty, integrity, caring and respecting others, etc.	-	-	-	-
PC4. follow environmentally sustainable practices	-	-	-	-
<i>Becoming a Professional in the 21st Century</i>	2	4	-	-
PC5. recognize the significance of 21st Century Skills for employment	-	-	-	-
PC6. practice the 21st Century Skills such as Self-Awareness, Behaviour Skills, time management, critical and adaptive thinking, problem-solving, creative thinking, social and cultural awareness, emotional awareness, learning to learn for continuous learning etc. in personal and professional life	-	-	-	-
<i>Basic English Skills</i>	2	3	-	-
PC7. use basic English for everyday conversation in different contexts, in person and over the telephone	-	-	-	-
PC8. read and understand routine information, notes, instructions, mails, letters etc. written in English	-	-	-	-
PC9. write short messages, notes, letters, e-mails etc. in English	-	-	-	-
<i>Career Development & Goal Setting</i>	1	2	-	-

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Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
PC10. understand the difference between job and career	-	-	-	-
PC11. prepare a career development plan with short- and long-term goals, based on aptitude	-	-	-	-
<i>Communication Skills</i>	2	2	-	-
PC12. follow verbal and non-verbal communication etiquette and active listening techniques in various settings	-	-	-	-
PC13. work collaboratively with others in a team	-	-	-	-
<i>Diversity & Inclusion</i>	1	2	-	-
PC14. communicate and behave appropriately with all genders and PwD	-	-	-	-
PC15. escalate any issues related to sexual harassment at workplace according to POSH Act	-	-	-	-
<i>Financial and Legal Literacy</i>	2	3	-	-
PC16. select financial institutions, products and services as per requirement	-	-	-	-
PC17. carry out offline and online financial transactions, safely and securely	-	-	-	-
PC18. identify common components of salary and compute income, expenses, taxes, investments etc	-	-	-	-
PC19. identify relevant rights and laws and use legal aids to fight against legal exploitation	-	-	-	-
<i>Essential Digital Skills</i>	3	4	-	-
PC20. operate digital devices and carry out basic internet operations securely and safely	-	-	-	-
PC21. use e- mail and social media platforms and virtual collaboration tools to work effectively	-	-	-	-
PC22. use basic features of word processor, spreadsheets, and presentations	-	-	-	-

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Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>Entrepreneurship</i>	2	3	-	-
PC23. identify different types of Entrepreneurship and Enterprises and assess opportunities for potential business through research	-	-	-	-
PC24. develop a business plan and a work model, considering the 4Ps of Marketing Product, Price, Place and Promotion	-	-	-	-
PC25. identify sources of funding, anticipate, and mitigate any financial/ legal hurdles for the potential business opportunity	-	-	-	-
<i>Customer Service</i>	1	2	-	-
PC26. identify different types of customers	-	-	-	-
PC27. identify and respond to customer requests and needs in a professional manner.	-	-	-	-
PC28. follow appropriate hygiene and grooming standards	-	-	-	-
<i>Getting ready for apprenticeship & Jobs</i>	2	3	-	-
PC29. create a professional Curriculum vitae (Résumé)	-	-	-	-
PC30. search for suitable jobs using reliable offline and online sources such as Employment exchange, recruitment agencies, newspapers etc. and job portals, respectively	-	-	-	-
PC31. apply to identified job openings using offline /online methods as per requirement	-	-	-	-
PC32. answer questions politely, with clarity and confidence, during recruitment and selection	-	-	-	-
PC33. identify apprenticeship opportunities and register for it as per guidelines and requirements	-	-	-	-
NOS Total	20	30	-	-

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National Occupational Standards (NOS) Parameters

NOS Code	DGT/VSQ/N0102
NOS Name	Employability Skills (60 Hours)
Sector	Cross Sectoral
Sub-Sector	Professional Skills
Occupation	Employability
NSQF Level	4
Credits	2
Version	1.0
Last Reviewed Date	15/03/2024
Next Review Date	15/03/2029
NSQC Clearance Date	15/03/2024

Assessment Guidelines and Assessment Weightage

Assessment Guidelines

1. Criteria for assessment for each Qualification will be created by the Sector Skill Council. Each Performance Criteria (PC) will be assigned marks proportional to its importance in NOS. SSC will also lay down the proportion of marks for Theory and Skills Practical for each PC.
2. The assessment for the theory part will be based on the knowledge bank of questions created by the SSC.
3. Assessment will be conducted for all compulsory NOS, and where applicable, on the selected elective/option NOS/set of NOS.
4. Individual assessment agencies will create unique question papers for the theory part for each candidate at each examination/training center (as per assessment criteria below).
5. Individual assessment agencies will create unique evaluations for skill practical for every student at each examination/ training center based on these criteria.
6. To pass the Qualification assessment, every trainee should score a minimum of 50% of % aggregate marks to successfully clear the assessment.



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7. In case of unsuccessful completion, the trainee may seek reassessment on the Qualification.

Minimum Aggregate Passing % at QP Level : 50

(Please note: Every Trainee should score a minimum aggregate passing percentage as specified above, to successfully clear the Qualification Pack assessment.)

Assessment Weightage

Compulsory NOS

National Occupational Standards	Theory Marks	Practical Marks	Project Marks	Viva Marks	Total Marks	Weightage
BSC/N4101.Perform data analysis using MS-Excel	70	130	0	0	200	70
DGT/VSQ/N0102.Employability Skills (60 Hours)	20	30	0	0	50	30
Total	90	160	0	0	250	100



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Acronyms

NOS	National Occupational Standard(s)
NSQF	National Skills Qualifications Framework
QP	Qualifications Pack
TVET	Technical and Vocational Education and Training

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Glossary

Sector	Sector is a conglomeration of different business operations having similar business and interests. It may also be defined as a distinct subset of the economy whose components share similar characteristics and interests.
Sub-sector	Sub-sector is derived from a further breakdown based on the characteristics and interests of its components.
Occupation	Occupation is a set of job roles, which perform similar/ related set of functions in an industry.
Job role	Job role defines a unique set of functions that together form a unique employment opportunity in an organisation.
Occupational Standards (OS)	OS specify the standards of performance an individual must achieve when carrying out a function in the workplace, together with the Knowledge and Understanding (KU) they need to meet that standard consistently. Occupational Standards are applicable both in the Indian and global contexts.
Performance Criteria (PC)	Performance Criteria (PC) are statements that together specify the standard of performance required when carrying out a task.
National Occupational Standards (NOS)	NOS are occupational standards which apply uniquely in the Indian context.
Qualifications Pack (QP)	QP comprises the set of OS, together with the educational, training and other criteria required to perform a job role. A QP is assigned a unique qualifications pack code.
Unit Code	Unit code is a unique identifier for an Occupational Standard, which is denoted by an 'N'
Unit Title	Unit title gives a clear overall statement about what the incumbent should be able to do.
Description	Description gives a short summary of the unit content. This would be helpful to anyone searching on a database to verify that this is the appropriate OS they are looking for.
Scope	Scope is a set of statements specifying the range of variables that an individual may have to deal with in carrying out the function which have a critical impact on quality of performance required.

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Knowledge and Understanding (KU)	Knowledge and Understanding (KU) are statements which together specify the technical, generic, professional and organisational specific knowledge that an individual needs in order to perform to the required standard.
Organisational Context	Organisational context includes the way the organisation is structured and how it operates, including the extent of operative knowledge managers have of their relevant areas of responsibility.
Technical Knowledge	Technical knowledge is the specific knowledge needed to accomplish specific designated responsibilities.
Core Skills/ Generic Skills (GS)	Core skills or Generic Skills (GS) are a group of skills that are the key to learning and working in today's world. These skills are typically needed in any work environment in today's world. These skills are typically needed in any work environment. In the context of the OS, these include communication related skills that are applicable to most job roles.
Electives	Electives are NOS/set of NOS that are identified by the sector as contributive to specialization in a job role. There may be multiple electives within a QP for each specialized job role. Trainees must select at least one elective for the successful completion of a QP with Electives.
Options	Options are NOS/set of NOS that are identified by the sector as additional skills. There may be multiple options within a QP. It is not mandatory to select any of the options to complete a QP with Options.