

MBA318: MARKETING OF FINANCIAL SERVICES

Teaching Scheme	Examination Scheme
Lectures: 4 hrs./Week Tutorials: 1 hrs./Week Credits: 4	Class Test -12Marks Teachers Assessment - 6Marks Attendance – 12 Marks End Semester Exam – 70 marks

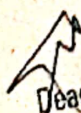
HOURS:40

UNIT I(10 Hrs): Financial Market Fundamentals: Equity Markets: Capital Markets, Role in the Economy, Brief History of BSE and NSE. Trade lifecycle of a financial instrument, Market Participants in the Equity markets with perspectives on 'Buy' side and 'Sell' side, Key terminologies related to the Equity markets. Bond Markets: Introduction to bond markets, how bond markets operate? Key terminologies related to the bond markets. Regulatory aspects of the Bond Markets, Key players in the Bond Markets (such as FIIs, Hedge Funds etc.) Debt Instruments: Debt instruments and their classification based on type of issuer, and basis characteristics. Money Market Instruments (such as Certificate of Deposit, Re-purchase "Agreements etc.)

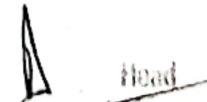
UNIT II(10 Hrs): Insurance: Basics of Insurance: Basic understanding of insurance products, types of insurance policies -- Role of IRDA, Insurance industry in India. General Insurance: Types of liabilities covered, extent of insurance value, and conditions. Life Insurance: Basic concept of Life Insurance, its beneficiaries and its types, Concept of Term Insurance and its various types, Traditional Life Insurance and its difference from Term Insurance, Whole Life Policy and Endowment Policy and the differences between them. ULIP and its comparison with conventional plans and Mutual Funds. Marketing Channels in Insurance Markets: Various channel members in the Industry such as Insurance Agents, Distributors, etc. Basic Understanding: Property and casualty/liability insurance, Commercial Insurance, Health Insurance.

UNIT III(10 Hrs): Other Financial Services: Leasing / Hire Purchase: Definition, meaning, types, process, advantages, limitations, financial implications. Housing Finance: Major institutions involved, types, rate of interest, advantages, scenario in India. Credit Cards: Meaning, types, growth, advantages and disadvantages, growth in India. Credit Rating Services: Origin, definition, advantages, credit rating agencies - global and Indian, symbols, CRISIL, ICRA, equity ratings, CIBIL, scope in India. Other Services: Factoring, forfeiting, bill discounting, consumer finance and venture capital.

UNIT IV(10 Hrs): Marketing of Financial Services: Importance of Financial Planning: identification of investment needs for retail investors, studying investment behavior - Household Vs. Institutional Investors. Alternate Investment Products: Introduction to Alternate Investments


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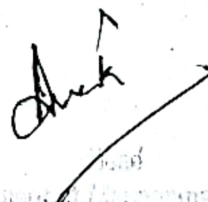

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and their various products and services, Portfolio Management Services and their features, Tax regulations from an Investment Advisor point of view. Career opportunities in Marketing of Financial Services.

Suggested Text Books:

1. Financial Services, M Y Khan, Tata McGraw-Hill
2. Financial Services & Markets, Dr. Punithavathy Pandian, Vikas Publication
3. Marketing of Financial Services, V.A. Avadhani, Himalaya Publishing House
4. Financial Services Marketing, Christine Ennew, Nigel Waite
5. Financial Services, Nalini Prava Tripathy, Prentice Hall of India Private Limited

COURSE OUTCOMES DESCRIPTION	
CO1	RECALL and DESCRIBE the key terminology of Financial Services.
CO2	DESCRIBE the various types of financial products and services.
CO3	DEVELOP FAQs for each kind of financial products and services from an investment advisor's perspective.
CO4	COMPARE and CONTRAST the various types of financial products and services and ILLUSTRATE their benefits and limitations.
CO5	EVALUATE the financial products and services from an investment perspective for various kinds of investors.
CO6	COLLECT the application forms for all kinds of investments and DISCUSS each of them.



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