

SUPPORTING DOCUMENTS

**CRITERION 1**

**1.3.2. Number of value-added courses for imparting transferable and life skills offered during last five years**

SUBMITTED TO

NATIONAL ASSESSMENT AND ACCREDITATION COUNCIL

BY



***N. L. Dalmia***<sup>®</sup>

***Institute of Management Studies and Research***

*(A School of Excellence of N. L. Dalmia Educational Society)*

N. L. DALMIA INSTITUTE OF  
MANAGEMENT STUDIES AND RESEARCH

FOR

**NAAC ACCREDITATION SECOND CYCLE 2022**



# **N. L. Dalmia<sup>®</sup>** **Institute of Management Studies and Research**

*(A School of Excellence of N. L. Dalmia Educational Society)*

**Number of value-added courses for  
imparting transferable and life skills  
offered during A.Y.2020-21**





## Supporting Documents

### 1.3.2. Number of value-added courses for imparting transferable and life skills offered during last five years

| Sr. No.  | Details  |
|--|--|
| <b>Number of value-added courses for imparting transferable and life skills offered during A.Y.2020-21</b> |  |
| 1  | Bloomberg Market Concepts  |
| 2  | Certification Program: Category III AIFs and Portfolio Management Services Hedge Funds |
| 3  | Certification Program: Category I AIFs and Category II AIFs - Private Equity           |
| 4  | Wealth Management And Financial Planning   |
| 5  | Alumni Mentoring (35 Hours)  |
| 6  | NLP Foundation Course  |
| 7  | HR Analytics Training  |
| 8  | EDX  |
| 9  | Markstat   |
| <b>Course Era</b>  |  |
| 1  | AI For Everyone  |
| 2  | Analyzing Company Performing using Ratios  |
| 3  | Behavioral Finance   |
| 4  | Brand Management Aligning Business, Brand and Behaviour                                |



## Supporting Documents

### 1.3.2. Number of value-added courses for imparting transferable and life skills offered during last five years

| Sr. No. | Details  |
|---------|--|
|         | <b>Number of value-added courses for imparting transferable and life skills offered during A.Y.2020-21</b> |
| 5       | Business Analytics for Decision Making   |
| 6       | Capstone:Retrieving,Processing,and Visualizing Data with Python  |
| 7       | Compare Stock Returns with Google Sheets   |
| 8       | Construct Stock Market Indices   |
| 9       | Create a Budget with Google Sheets   |
| 10      | Create a Google Ads Search Campaign  |
| 11      | creative Thinking:Techniques and Tools for Success   |
| 12      | Customer Analytics   |
| 13      | Diversity and inclusion in the workplace   |
| 14      | Effective Sales - An Overview  |
| 15      | Excel Skills for Business  |
| 16      | Finance for Everyone Decisions   |
| 17      | Finance for Everyone Markets   |
| 18      | Financial Markets  |



## Supporting Documents

### 1.3.2. Number of value-added courses for imparting transferable and life skills offered during last five years

| Sr. No. | Details  |
|---------|--|
|         | <b>Number of value-added courses for imparting transferable and life skills offered during A.Y.2020-21</b> |
| 19      | FinTech and the Transformation in Financial Services   |
| 20      | FinTech Foundations and Overview   |
| 21      | Forensic Accounting and Fraud Examination  |
| 22      | Foundations of Business Strategy   |
| 23      | Global Financial Markets   |
| 24      | Introduction of People Analytics   |
| 25      | Introduction to Financial Markets  |
| 26      | Introduction to Personal Branding  |
| 27      | Introduction to Valuation with WACC  |
| 28      | Investment Risk Management   |
| 29      | Investment Strategy  |
| 30      | Language and Tools of Financial Analysis   |
| 31      | Leading Teams  |
| 32      | Learning How to Learn: Powerful mental tools to help you master tough subjects                             |



## Supporting Documents

### 1.3.2. Number of value-added courses for imparting transferable and life skills offered during last five years

| Sr. No. | Details  |
|---------|--|
|         | <b>Number of value-added courses for imparting transferable and life skills offered during A.Y.2020-21</b> |
| 33      | Managing as a Coach  |
| 34      | Managing Project Risks and Changes   |
| 35      | Managing Talents   |
| 36      | Market Research and Consumer Behavior  |
| 37      | Marketing Analytics  |
| 38      | Marketing Analytics: Know your customers   |
| 39      | People Analytics   |
| 40      | Preparing to Manage Human Resource   |
| 41      | Programming for Everybody (Getting Started with Python)  |
| 42      | Research Proposal: Initiating Research   |
| 43      | Six sigma Principles   |
| 44      | Stock Valuation with Comparable Companies Analysis   |
| 45      | Stock Valuation with Dividend Discount Model   |
| 46      | The Language and Tools of Finance Analysis   |





## Supporting Documents

### 1.3.2. Number of value-added courses for imparting transferable and life skills offered during last five years

| Sr. No.  | Details   |
|--|---|
| <b>Number of value-added courses for imparting transferable and life skills offered during A.Y.2020-21</b> |   |
| 47   | Trading Algorithms  |
| 48   | Trading Basics  |
| 49   | Using Databases With Python   |
| 50   | Work Smarter,Not Harder:Time Management for Personal & Productivity |



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**Bloomberg Market Concepts Certification**

### Course Plan

|                            |                      |
|----------------------------|----------------------|
| <b>Program</b>             | PGDM - Finance       |
| <b>Course Title</b>        | Bloomberg            |
| <b>Course Credit</b>       | NA                   |
| <b>Academic Year</b>       | 2020-21              |
| <b>Batch</b>               | 2020-22              |
| <b>Duration (Hrs)</b>      | 90                   |
| <b>Name of the Faculty</b> | Prof. Prakash Rathod |

#### 1. Course Overview

Universities, colleges and corporates around the globe use Bloomberg to bring the real world of finance into the classroom, providing students with access to the same information platform used by leading decision makers in business, finance and government.

The Bloomberg Professional service and Bloomberg Terminal seamlessly integrate the very best in data, news and analytics. The Terminal is a 24-hour, global financial services system that provides transparent and reliable financial, economic and government information covering all market sectors. It features company financials, market data spanning more than 20 years, charts, statistics, a communications platform and current news reports.

The Bloomberg Terminal brings together real-time data on every market, breaking news, in-depth research, powerful analytics, communications tools and world-class execution capabilities — in one fully integrated solution.

Up-to-the-minute access to the news that matters, that moves markets and that changes the course of a business can make all the difference. News is reported when it happens, from where it happens. With more than 2,700 news professionals in 120 countries, Bloomberg's award-winning coverage of companies, markets, economies, politics and governments ensures that you get the information you need when you need it most.

Bloomberg has a broad range of research offerings including direct access to sell-side and independent research from more than 1,500 sources, as well as proprietary, analyst-driven research that provides a comprehensive view of industries and their key constituents with unsurpassed depth and breadth at the sector, industry and company levels. This course is intended to provide an overview of the Bloomberg Professional service so students can get started using this powerful tool.

N.L. Dalmia Institute of Management Studies and Research is the first Institute to set up the Bloomberg lab in Mumbai to provide students an extremely focused and high end knowledge programs with a high degree of practical learning and on-the-Job applicability especially for finance & research students.



## 2. Course Outcomes (CO)

| Sr. No | At the end of the course students will be able to :   |
|--------|---|
| C01    | Bloomberg Technical Training Certifications.<br>1. Bloomberg Market Concepts<br>2. Bloomberg Analyst Certification  |
| C02    | Illustrate the world equity Indices, world economic indicators, Statistics, world center banks, Industries and all financial On & Off market instruments. Liquidity, volatility, maturity, and pricing of various financial instruments issued across domestic and foreign markets. |
| C03    | Provides a comprehensive overview how students can import Bloomberg data into Microsoft Excel. It includes a step-by-step guide, cheat sheets and descriptions of recent enhancements. Will also display information on performing Bloomberg calculations in Excel.                 |
| C04    | Analyze Portfolio and risk analytics, monitoring, characteristics, attribution, historical performance & pinpoint the sources of active risk in portfolios with fundamental risk factor Models.   |

## 3. Course Outcome and Program Outcome mapping

|     | PO1 | PO2 | PO3 | PO4 | PO5 |
|-----|-----|-----|-----|-----|-----|
| C01 | H   |     |     | M   |     |
| C02 | H   | H   |     |     |     |
| C03 |     |     | L   | H   |     |
| C04 | H   | H   |     | M   |     |

### H- Highly correlated, M- Moderately correlated, L- less correlation

PO1- Apply knowledge of management theories and practices to solve business problems

PO2- Foster Analytical and Critical Thinking abilities for data based decision making

PO3- Ability to develop Value based Leadership ability

PO4- Ability to understand, analyze and communicate global, economic, legal and ethical aspects of business

PO5- Ability to lead themselves and others in the achievement of organizational goals, contributing effectively to a team environment





#### 4. Course Overview

| Module No. | Topic   | Sessions |
|------------|---|----------|
| 1          | <b>Introduction and System Navigation:</b><br>Introduction to Bloomberg<br>Key Board navigation<br>Basic commands   | 1-3      |
| 1          | <b>Economic indicators:</b><br>Discover the fundamentals of how economic indicators are published and analyzed.   | 4-13     |
| 3          | <b>Equities:</b><br>A deep immersion into the exciting, volatile world of equity investing, with such sub modules as Introducing the Stock Market, The Nature Of Equities, Equity Research, Absolute Valuation, and Relative Valuation. Many Terminal functions are covered and students will leave course with a deep and robust knowledge base to build upon. | 14-24    |
| 4          | <b>Bloomberg Market Concepts:</b><br>Bloomberg Technical Training Certification.  | 25-32    |
| 4          | <b>Money Market:</b><br>T-bills, Commercial Paper, Call money market, Commercial Bill Market, Repo and Reverse Repo.  | 32-35    |
| 4          | <b>Fixed income securities/ Bond Market:</b><br>Deep into the world of Fixed Income, with sub modules including The Roots Of The Bond Market, Bond Valuation. Drivers, Central Bankers & Interest Rates, The Yield Curve & Why It Matters, and Movements In The Yield Curve. A number of key Terminal functions covering FI will be explored.                   | 36-42    |
| 5          | <b>Currencies/FX Market:</b><br>Currency Market Mechanics, Currency Valuation, Central Banks and Currencies, and Currency Risk, you can help students start to master liquidity, investment, and cross-border Analytics capital flows. An array of Terminal functions will be utilized.   | 43-48    |
| 6          | <b>Technical indicators/Analytics and Charts:</b><br>Markets, Industry, sectors and Company in-depth analyses using Graphic fundamentals.   | 49-54    |



### 5. Pre requisites /co requisites (if any) from students

| Sr. No | Details   |
|--------|---|
| 1      | Awareness regarding finance and economics in the country and around the world |
| 2      | Basic Technical and Analytical skill  |

### 6. Session Plan (Each session of 90 minutes)

| Session No | Topics/Units                                     | Pedagogy   | Expected Learning outcome   | Resources (Books/ Chaps / Case etc) |
|------------|--|--|---|-------------------------------------|
| 1          | Introduction to Bloomberg and system navigations | Class room Discussion & Interaction                              | Understand Bloomberg Terminals, History, founder, Login credentials   | NA                                  |
| 2          | Introduction to Bloomberg and system navigations | Class room Discussion, Interaction & Practical – Demo & Practice | Explain the Bloomberg Keyboard The red stop keys, green action keys and yellow market sector keys help you access information quickly and easily.                               | NA                                  |
| 3          | Introduction to Bloomberg and system navigations | Class room Discussion, Interaction & Practical – Demo & Practice | ACCESSING THE APPLICATION; Bloomberg panels, settings, create a login name and password when logging in for the first time  | NA                                  |
| 4          | Economic indicators:                             | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate various Economic indicators<br>WECO -> world economic calendar<br>ECST -> for macroeconomic parameters<br>EMKT -> emerging mkt trends msg<br>ECOW -> World eco stats | NA                                  |
| 5          | Economic indicators:                             | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate various Economic indicators<br>Bloomberg Commands  | NA                                  |



| Session No | Topics/Units         | Pedagogy  | Expected Learning outcome                                    | Resources (Books/ Chaps / Case etc) |
|------------|----------------------|---|--|-------------------------------------|
| 6          | Economic indicators: | Class room Discussion, Interaction & Practical - Demo & Practice                        | Illustrate various Economic indicators<br>Bloomberg Commands | NA                                  |
| 7          | Economic indicators: | Class room Discussion, Interaction & Practical - Demo & Practice                        | Illustrate various Economic indicators<br>Bloomberg Commands | NA                                  |
| 8          | Economic indicators: | Class room Discussion, Class room Discussion, Interaction & Practical - Demo & Practice | Illustrate various Economic indicators<br>Bloomberg Commands | NA L.M.Bhole<br>NA                  |
| 9          | Economic indicators: | Class room Discussion, Interaction & Practical - Demo & Practice                        | Illustrate various Economic indicators<br>Bloomberg Commands | NA                                  |
| 10         | Economic indicators: | Class room Discussion, Interaction & Practical - Demo & Practice                        | Illustrate various Economic indicators<br>Bloomberg Commands | NA                                  |
| 11         | Economic indicators: | Class room Discussion, Interaction & Practical - Demo & Practice                        | Illustrate various Economic indicators<br>Bloomberg Commands | NA                                  |
| 12         | Economic indicators: | Class room Discussion, Interaction & Practical - Demo & Practice                        | Illustrate various Economic indicators<br>Bloomberg Commands | NA                                  |



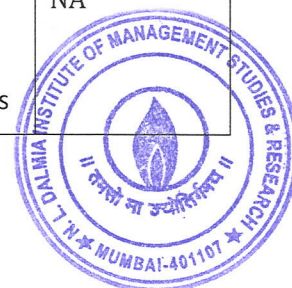


| Session No | Topics/Units         | Pedagogy   | Expected Learning outcome   | Resources (Books/ Chaps / Case etc) |
|------------|----------------------|--|---|-------------------------------------|
| 13         | Economic indicators: | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate various Economic indicators<br>Bloomberg Commands  | NA                                  |
| 14         | Equities:            | Class room Discussion, Interaction & Practical – Demo & Practice | Functions & Securities<br>Functions used in Bloomberg: 7. HCPI –<br><br>1. DES – Security Description<br>2. TK – Ticker Symbol lookup<br>3. SECF – Security Finder<br>4. MGMT – Company management<br>5. HP – Historic Price<br>6. GP – Graph Price   | NA                                  |
| 15         | Equities:            | Class room Discussion, Interaction & Practical – Demo & Practice | 7. HCPI – Historic Open, High, Low and Closing prices<br>8. DVD – Dividend and Split details<br>9. CACS – Corporate Action Summary<br>10. EE – Earnings & Estimates<br>11. GIP – Intraday Price Chart<br>12. GPO – Year to Year Price Chart<br>13. ANR – Analysts Recommendation<br>14. RV – Relative Valuation | NA                                  |
| 16         | Equities:            | Class room Discussion, Interaction & Practical – Demo & Practice | 15. MA – Mergers & Acquisition<br>16. CNDL – Candlestick Chart<br>17. COMP – Compare two securities while viewing a graph<br>18. MOST – Most Active Securities<br>19. FUND – Mutual Fund Search   | NA                                  |





| Session No | Topics/Units | Pedagogy   | Expected Learning outcome  | Resources (Books/ Chaps / Case etc) |
|------------|--------------|--|--|-------------------------------------|
|            |              |  | 20. EVTS – Company Events<br>21. CN – Current News<br>22. NI – Search News for Specific Category   |                                     |
| 17         | Equities:    | Class room Discussion, Interaction & Practical – Demo & Practice | HDS -> security ownership<br>- DDIS -> debt distribution (select debt type)<br>- EPR -> stock exchange profile<br>- EM -> Earning matrix / trends<br>- CN -> Company news<br>- FTST -> factor back tester -> create custom | NA                                  |
| 18         | Equities:    | Class room Discussion, Interaction & Practical – Demo & Practice | GIQ -> intraday market chart<br>- BXT -> Buy ticket<br>- SXT -> Sell ticket<br>- CRPR -> Credit rating profile<br>- FIPX -> Fixed income price discovery<br>- NIM -> New issue monitor                                     | NA                                  |
| 19         | Equities:    | Class room Discussion, Interaction & Practical – Demo & Practice | COMM/RV/RAC /ANR/RITA– Comparative Analyses  | NA                                  |
| 20         | Equities:    | Class room Discussion, Interaction & Practical – Demo & Practice | PORT -> portfolio & risk analytics<br><br>KI -> Key insights<br><br>SPLC- > Supply chain analysis  | NA                                  |
| 21         | Equities:    | Class room Discussion, Interaction & Practical –                 | Illustrate various Equity Bloomberg Commands<br>TMSG -> Trade ideas  | NA                                  |



| Session No | Topics/Units                              | Pedagogy   | Expected Learning outcome                         | Resources (Books/ Chaps / Case etc) |
|------------|---|--|---|-------------------------------------|
|            |   | Demo & Practice  |   |                                     |
| 22         | Equities:                                 | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate various Equity Bloomberg Commands      | NA                                  |
| 23         | Equities:                                 | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate various Equity Bloomberg Commands      | NA                                  |
| 24         | Equities:                                 | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate various Equity Bloomberg Commands      | NA                                  |
| 25         | Bloomberg Markets Concepts Certification. | Online Assessment  | Certification                                     | NA                                  |
| 26         | Bloomberg Markets Concepts Certification. | Online Assessment  | Certification                                     | NA                                  |
| 27         | Bloomberg Markets Concepts Certification. | Online Assessment  | Certification                                     | NA                                  |
| 28         | Bloomberg Markets Concepts Certification. | Online Assessment  | Certification                                     | NA                                  |
| 29         | Bloomberg Markets Concepts Certification. | Online Assessment  | Certification                                     | NA                                  |
| 30         | Bloomberg Markets Concepts Certification. | Online Assessment  | Certification                                     | NA                                  |
| 31         | Bloomberg Markets Concepts Certification. | Online Assessment  | Certification                                     | NA                                  |
| 32         | Money Market                              | Class room Discussion, Interaction &                             | Illustrate various Bloomberg Commands for T-Bills | NA                                  |



| Session No | Topics/Units                          | Pedagogy   | Expected Learning outcome  | Resources (Books/ Chaps / Case etc) |
|------------|---------------------------------------|--|--|-------------------------------------|
|            |                                       | Practical – Demo & Practice                                      |  |                                     |
| 33         | Money Market                          | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate various Bloomberg Commands for Commercial Papers                | NA                                  |
| 34         | Money Market                          | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate various Bloomberg Commands for Repos                            | NA                                  |
| 35         | Fixed income securities/ Bond Market: | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate various Bloomberg Commands – Related to Fixed income securities | NA                                  |
| 36         | Fixed income securities/ Bond Market: | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate various Bloomberg Commands – Related to Fixed income securities | NA                                  |
| 37         | Fixed income securities/ Bond Market: | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate various Bloomberg Commands – Related to Fixed income securities | NA                                  |
| 38         | Fixed income securities/ Bond Market: | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate various Bloomberg Commands – Related to Fixed income securities | NA                                  |
| 39         | Fixed income securities/              | Class room   | Illustrate various   | NA                                  |



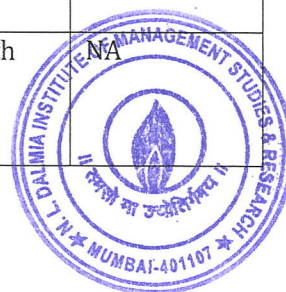


| Session No | Topics/Units                          | Pedagogy   | Expected Learning outcome   | Resources (Books/ Chaps / Case etc) |
|------------|---------------------------------------|--|---|-------------------------------------|
|            | Bond Market:                          | Discussion, Interaction & Practical – Demo & Practice            | Bloomberg Commands – Related to Fixed income securities   |                                     |
| 40         | Fixed income securities/ Bond Market: | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate various Bloomberg Commands – Related to Fixed income securities  | NA                                  |
| 41         | Fixed income securities/ Bond Market: | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate various Bloomberg Commands – Related to Fixed income securities  | NA                                  |
| 42         | Fixed income securities/ Bond Market: | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate various Bloomberg Commands – Related to Fixed income securities  | NA                                  |
| 43         | Currencies/FX Market:                 | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate various Bloomberg Commands – Related to Currencies – SPOT & Forward FX, FX Conversions, Global Currency Matrix etc | NA                                  |
| 44         | Currencies/FX Market:                 | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate various Bloomberg Commands – Related to Currencies – SPOT & Forward FX, FX Conversions, Global Currency Matrix etc | NA                                  |
| 45         | Currencies/FX Market:                 | Class room Discussion, Interaction & Practical – Demo &          | Illustrate various Bloomberg Commands – Related to Currencies – SPOT & Forward FX, FX Conversions, Global Currency Matrix etc | NA                                  |





| Session No | Topics/Units                              | Pedagogy   | Expected Learning outcome   | Resources (Books/ Chaps / Case etc) |
|------------|---|--|---|-------------------------------------|
|            |   | Practice   |   |                                     |
| 46         | Currencies/FX Market:                     | Class room Discussion, Interaction & Practical - Demo & Practice | Illustrate various Bloomberg Commands - Related to Currencies - SPOT & Forward FX, FX Conversions, Global Currency Matrix etc | NA                                  |
| 47         | Currencies/FX Market:                     | Class room Discussion, Interaction & Practical - Demo & Practice | Illustrate various Bloomberg Commands - Related to Currencies - SPOT & Forward FX, FX Conversions, Global Currency Matrix etc | NA                                  |
| 48         | Currencies/FX Market:                     | Class room Discussion, Interaction & Practical - Demo & Practice | Illustrate various Bloomberg Commands - Related to Currencies - SPOT & Forward FX, FX Conversions, Global Currency Matrix etc | NA                                  |
| 49         | Technical indicators/Analytics and Charts | Class room Discussion, Interaction & Practical - Demo & Practice | Illustrate in-depth analyses using Graphic fundamentals Related Markets, Industry, sectors and Company                        | NA                                  |
| 50         | Technical indicators/Analytics and Charts | Class room Discussion, Interaction & Practical - Demo & Practice | Illustrate in-depth analyses using Graphic fundamentals Related Markets, Industry, sectors and Company                        | NA                                  |
| 51         | Technical indicators/Analytics and Charts | Class room Discussion, Interaction & Practical - Demo & Practice | Illustrate in-depth analyses using Graphic fundamentals Related Markets, Industry, sectors and Company                        | NA                                  |
| 52         | Technical indicators/Analytics and Charts | Class room Discussion, Interaction &                             | Illustrate in-depth analyses using Graphic fundamentals   | NA                                  |



| Session No | Topics/Units                              | Pedagogy   | Expected Learning outcome  | Resources (Books/ Chaps / Case etc) |
|------------|---|--|--|-------------------------------------|
|            |   | Practical – Demo & Practice                                      | Related Markets, Industry, sectors and Company   |                                     |
| 53         | Technical indicators/Analytics and Charts | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate in-depth analyses using Graphic fundamentals Related Markets, Industry, sectors and Company | NA                                  |
| 54         | Technical indicators/Analytics and Charts | Class room Discussion, Interaction & Practical – Demo & Practice | Illustrate in-depth analyses using Graphic fundamentals Related Markets, Industry, sectors and Company | NA                                  |
| 55         | Bloomberg Analyst Certification           | Practical & Theory   | Certification  | NA                                  |
| 56         | Bloomberg Analyst Certification           | Practical & Theory   | Certification  | NA                                  |
| 57         | Bloomberg Analyst Certification           | Practical & Theory   | Certification  | NA                                  |
| 58         | Bloomberg Analyst Certification           | Practical & Theory   | Certification  | NA                                  |
| 59         | Bloomberg Analyst Certification           | Practical & Theory   | Certification  | NA                                  |
| 60         | Bloomberg Analyst Certification           | Practical & Theory   | Certification  | NA                                  |



7. Detailed Assessment Plan (briefly describe each component and how the students are going to be evaluated)

| Sr. No | Components with details  | Individual/Group | Marks    | Intended CO to be assessed |
|--------|--|------------------|----------|----------------------------|
| 1      | Bloomberg Market Concepts  | Individual       | 100      | C01, C02                   |
| 2      | Part I - Assessment - Practical / MCQ<br>Part II - Assessment - Financial Market Analyses report | Individual       | 50<br>50 | C01, C02, C03, C04.        |
|        | <b>Total</b>   |                  | 100      |                            |

|   |  |
|---|--|
| <b>Prepared by:</b><br>(Faculty name and signature with date) | <b>Prof. Prakash Rathod</b>                  |
| <b>Approved by:</b><br>Name and signature with date           | <b>Program Head</b><br><b>Dr. Jyoti Nair</b> |





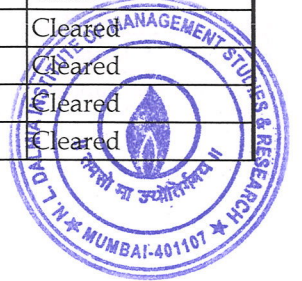


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Following students attended Bloomberg Certification

Batch 2020-22

| SR. | Specialisation | Division | Name of the Candidate | Roll Number | Remarks         |
|-----|----------------|----------|-----------------------|-------------|-----------------|
| 1   | Finance        | A        | Aakamshi Salian       | PF2022-1001 | Cleared         |
| 2   | Finance        | A        | Aakarsh Bedi          | PF2022-1056 | Cleared         |
| 3   | Finance        | A        | Aayushi Shah          | PF2022-1100 | Cleared         |
| 4   | Finance        | B        | Abhinav Saksena       | PF2022-2057 | Cleared         |
| 5   | Finance        | A        | Abrar Khan .          | PF2022-1115 | Cleared         |
| 6   | Finance        | B        | Adesh Brahme          | PF2022-2116 | Cleared         |
| 7   | Finance        | B        | Aditi Malpani         | PF2022-2002 | Cleared         |
| 8   | Finance        | C        | Aditya Agarwal        | PF2022-3058 | Cleared         |
| 9   | Finance        | C        | Aishwary Porwal       | PF2022-3117 | Cleared         |
| 10  | Finance        | C        | Akanksha Manjrekar    | PF2022-3003 | Cleared         |
| 11  | Finance        | D        | Akshat Maheshwari     | PF2022-4059 | Cleared         |
| 12  | Finance        | D        | Akshay Shelar         | PF2022-4118 | Cleared         |
| 13  | Finance        | D        | Ambika Dubey          | PF2022-4004 | Cleared         |
| 14  | Finance        | A        | Amol Nakashe          | PF2022-1119 | Cleared         |
| 15  | Finance        | B        | Anand Dubey           | PF2022-2120 | Cleared         |
| 16  | Finance        | C        | Anirudh Sharma        | PF2022-3121 | Cleared         |
| 17  | Finance        | D        | Ankit Pandey          | PF2022-4122 | Cleared         |
| 18  | Finance        | A        | Ankita Verma          | PF2022-1005 | Cleared         |
| 19  | Finance        | A        | Ankush Chawhan        | PF2022-1123 | Cleared         |
| 20  | Finance        | A        | Arth Soni             | PF2022-1060 | Cleared         |
| 21  | Finance        | B        | Ashish Sharma         | PF2022-2124 | Cleared         |
| 22  | Finance        | C        | Ashwin Kawale         | PF2022-3125 | Cleared         |
| 23  | Finance        | B        | Atharva Pai           | PF2022-2061 | Cleared         |
| 24  | Finance        | D        | Atharva Parkhi        | PF2022-4126 | Cleared         |
| 25  | Finance        | C        | Atif Azmi             | PF2022-3062 | Cleared         |
| 26  | Finance        | B        | Avani Parekh          | PF2022-2006 | Cleared         |
| 27  | Finance        | D        | Ayaz Qureshi          | PF2022-4063 | Cleared         |
| 28  | Finance        | A        | Ayush Maheshwari      | PF2022-1064 | Cleared         |
| 29  | Finance        | B        | Azim Bawa             | PF2022-2065 | Cleared         |
| 30  | Finance        | D        | Cardoz Marilyn        | PF2022-4008 | Failed to Clear |
| 31  | Finance        | C        | Deep Lapsia           | PF2022-3066 | Cleared         |
| 32  | Finance        | A        | Deepshikha Yadav      | PF2022-1009 | Cleared         |
| 33  | Finance        | B        | Devika Ghosh          | PF2022-2101 | Cleared         |
| 34  | Finance        | B        | Dhwani Prabhawalkar   | PF2022-2010 | Cleared         |
| 35  | Finance        | C        | Dipali Ghule          | PF2022-3102 | Cleared         |
| 36  | Finance        | C        | Disha Gogri Ashwin    | PF2022-3011 | Cleared         |
| 37  | Finance        | D        | Estuti Jain           | PF2022-4012 | Cleared         |
| 38  | Finance        | A        | Gunwant Lambodari     | PF2022-1127 | Cleared         |
| 39  | Finance        | A        | Harleen Kaur Kaberwal | PF2022-1013 | Cleared         |
| 40  | Finance        | D        | Harsh Sheth           | PF2022-4067 | Cleared         |
| 41  | Finance        | D        | Heena Fatwani         | PF2022-4103 | Cleared         |







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| SR. | Specialisation | Division | Name of the Candidate  | Roll Number | Remarks         |
|-----|----------------|----------|------------------------|-------------|-----------------|
| 42  | Finance        | B        | Heenal Solanki         | PF2022-2014 | Cleared         |
| 43  | Finance        | B        | Himanshu Khatik        | PF2022-2128 | Cleared         |
| 44  | Finance        | C        | Himanshu Kumbhare      | PF2022-3129 | Cleared         |
| 45  | Finance        | A        | Hritik Kumar           | PF2022-1068 | Cleared         |
| 46  | Finance        | C        | Janvi Shah             | PF2022-3015 | Failed to Clear |
| 47  | Finance        | B        | Javed Shaikh           | PF2022-2069 | Cleared         |
| 48  | Finance        | A        | Juhi Ashar             | PF2022-1163 | Cleared         |
| 49  | Finance        | C        | Karun Mathew           | PF2022-3070 | Cleared         |
| 50  | Finance        | D        | Kaustubh Karnik        | PF2022-4162 | Cleared         |
| 51  | Finance        | D        | Khyati Shah            | PF2022-4016 | Cleared         |
| 52  | Finance        | B        | Kiran Maurya           | PF2022-2166 | Cleared         |
| 53  | Finance        | A        | Krishani Gokani        | PF2022-1017 | Cleared         |
| 54  | Finance        | C        | Krutika Moharir        | PF2022-3167 | Cleared         |
| 55  | Finance        | D        | Kunal Prabhu           | PF2022-4130 | Cleared         |
| 56  | Finance        | D        | Kush Sampat            | PF2022-4071 | Cleared         |
| 57  | Finance        | D        | Kushal Jhaveri         | PF2022-4171 | Cleared         |
| 58  | Finance        | B        | Lavkush Chaurasia      | PF2022-2132 | Cleared         |
| 59  | Finance        | A        | Manan Munshi           | PF2022-1072 | Cleared         |
| 60  | Finance        | A        | Manasi Deshmukh        | PF2022-1104 | Cleared         |
| 61  | Finance        | C        | Mandar Patil           | PF2022-3133 | Cleared         |
| 62  | Finance        | B        | Mansi Mosamkar         | PF2022-2018 | Cleared         |
| 63  | Finance        | C        | Manushi Shah           | PF2022-3019 | Cleared         |
| 64  | Finance        | B        | Meet Shah              | PF2022-2073 | Cleared         |
| 65  | Finance        | D        | Mohamed Sohel Siddiqui | PF2022-4134 | Cleared         |
| 66  | Finance        | A        | Mohammad Rehan Khan    | PF2022-1135 | Cleared         |
| 67  | Finance        | C        | Mukul Pandey           | PF2022-3074 | Cleared         |
| 68  | Finance        | C        | Namrata Yadav          | PF2022-3106 | Cleared         |
| 69  | Finance        | D        | Natasha Fernandes      | PF2022-4020 | Failed to Clear |
| 70  | Finance        | D        | Nidhi Mittal           | PF2022-4170 | Cleared         |
| 71  | Finance        | A        | Nihalee Chalke         | PF2022-1021 | Failed to Clear |
| 72  | Finance        | D        | Nikhil Sharma          | PF2022-4075 | Cleared         |
| 73  | Finance        | B        | Nipun Dhoble           | PF2022-2136 | Cleared         |
| 74  | Finance        | A        | Nirajkumar Bhanushali  | PF2022-1076 | Cleared         |
| 75  | Finance        | C        | Nishad Ambulkar        | PF2022-3137 | Failed to Clear |
| 76  | Finance        | B        | Nishant Shelar         | PF2022-2077 | Cleared         |
| 77  | Finance        | D        | Nishe Sah              | PF2022-4107 | Failed to Clear |
| 78  | Finance        | C        | Nishit Relan           | PF2022-3078 | Cleared         |
| 79  | Finance        | D        | Omkar Joshi            | PF2022-4138 | Cleared         |
| 80  | Finance        | A        | Onkar Jadhav           | PF2022-1139 | Cleared         |
| 81  | Finance        | B        | Paras Tank             | PF2022-2140 | Failed to Clear |







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|-----|----------------|----------|----------------------------|-------------|-----------------|
| 82  | Finance        | C        | Parth Raval                | PF2022-3141 | Cleared         |
| 83  | Finance        | B        | Paurin Zaveri              | PF2022-2081 | Cleared         |
| 84  | Finance        | C        | Pawan Kukreja              | PF2022-3082 | Cleared         |
| 85  | Finance        | D        | Piyush Nakade              | PF2022-4142 | Cleared         |
| 86  | Finance        | B        | Pradnya Sawal              | PF2022-2022 | Cleared         |
| 87  | Finance        | D        | Prasad Desai               | PF2022-4083 | Cleared         |
| 88  | Finance        | A        | Prashant Upadhyay          | PF2022-1143 | Cleared         |
| 89  | Finance        | A        | Prathamesh Banerjee        | PF2022-1084 | Cleared         |
| 90  | Finance        | B        | Pratik Chandrashekhar Giri | PF2022-2144 | Cleared         |
| 91  | Finance        | C        | Pratik Ginnalwar           | PF2022-3145 | Cleared         |
| 92  | Finance        | B        | Pratik Jadhav              | PF2022-2085 | Cleared         |
| 93  | Finance        | D        | Pratik Jain                | PF2022-4146 | Cleared         |
| 94  | Finance        | C        | Priyanka Joshi             | PF2022-3023 | Cleared         |
| 95  | Finance        | A        | Rachel Dsouza              | PF2022-1108 | Cleared         |
| 96  | Finance        | A        | Rahul Anil Singh           | PF2022-1172 | Cleared         |
| 97  | Finance        | C        | Rahul Tulsian              | PF2022-3086 | Cleared         |
| 98  | Finance        | D        | Rajkumar Gupta             | PF2022-4087 | Cleared         |
| 99  | Finance        | C        | Rajvi Patadia              | PF2022-3164 | Cleared         |
| 100 | Finance        | D        | Rakhi Narula               | PF2022-4024 | Cleared         |
| 101 | Finance        | B        | Raksha Sharma              | PF2022-2109 | Cleared         |
| 102 | Finance        | C        | Rakshata Khatawkar         | PF2022-3110 | Cleared         |
| 103 | Finance        | A        | Rhutuja Walimbe            | PF2022-1025 | Cleared         |
| 104 | Finance        | B        | Richa Warang               | PF2022-2026 | Cleared         |
| 105 | Finance        | C        | Riddhi Rungta              | PF2022-3027 | Cleared         |
| 106 | Finance        | D        | Ritika Ramane              | PF2022-4028 | Cleared         |
| 107 | Finance        | A        | Ritu Yadav                 | PF2022-1029 | Cleared         |
| 108 | Finance        | A        | Ronak Mehta                | PF2022-1088 | Failed to Clear |
| 109 | Finance        | B        | Ronak Shah                 | PF2022-2089 | Cleared         |
| 110 | Finance        | B        | Rounak Kothari             | PF2022-2148 | Failed to Clear |
| 111 | Finance        | A        | Rounak Tipnis              | PF2022-1165 | Cleared         |
| 112 | Finance        | B        | Rucha Kelkar               | PF2022-2030 | Cleared         |
| 113 | Finance        | C        | Rucha Pathak               | PF2022-3031 | Cleared         |
| 114 | Finance        | D        | Ruchi Shah                 | PF2022-4032 | Cleared         |
| 115 | Finance        | A        | Rujuta Kulkarni            | PF2022-1033 | Cleared         |
| 116 | Finance        | C        | Rushabh Doshi              | PF2022-3090 | Cleared         |
| 117 | Finance        | B        | Rutuja Yewale              | PF2022-2034 | Cleared         |
| 118 | Finance        | C        | Sakshi Jain                | PF2022-3035 | Cleared         |
| 119 | Finance        | D        | Sakshi Khemka              | PF2022-4036 | Cleared         |
| 120 | Finance        | D        | Sameer Sawant              | PF2022-4150 | Cleared         |
| 121 | Finance        | D        | Sanjukta Singh             | PF2022-4111 | Cleared         |







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| SR. | Specialisation | Division | Name of the Candidate   | Roll Number | Remarks         |
|-----|----------------|----------|-------------------------|-------------|-----------------|
| 122 | Finance        | A        | Sanket Sapat            | PF2022-1151 | Cleared         |
| 123 | Finance        | B        | Sarang Giradkar         | PF2022-2152 | Cleared         |
| 124 | Finance        | A        | Sarvesh Thakurdesai     | PF2022-1092 | Cleared         |
| 125 | Finance        | C        | Shagun Beria            | PF2022-3168 | Cleared         |
| 126 | Finance        | B        | Shail Thadeshwar        | PF2022-2169 | Cleared         |
| 127 | Finance        | A        | Sharmishtha Harne       | PF2022-1112 | Failed to Clear |
| 128 | Finance        | C        | Shivani Nayak           | PF2022-3039 | Cleared         |
| 129 | Finance        | D        | Shreesha Padunnayil     | PF2022-4040 | Cleared         |
| 130 | Finance        | B        | Shreya Ghosh            | PF2022-2113 | Cleared         |
| 131 | Finance        | A        | Shreya Jain             | PF2022-1041 | Cleared         |
| 132 | Finance        | B        | Shreya Jog              | PF2022-2042 | Cleared         |
| 133 | Finance        | A        | Shreyank Rao            | PF2022-1161 | Cleared         |
| 134 | Finance        | C        | Shrishti Kedia          | PF2022-3043 | Cleared         |
| 135 | Finance        | D        | Shruti Kedia            | PF2022-4044 | Cleared         |
| 136 | Finance        | C        | Shubham Agrawal         | PF2022-3153 | Failed to Clear |
| 137 | Finance        | B        | Shubham Bangar          | PF2022-2093 | Cleared         |
| 138 | Finance        | D        | Shubham Dolas           | PF2022-4154 | Cleared         |
| 139 | Finance        | A        | Sidhesh Kadam           | PF2022-1155 | Cleared         |
| 140 | Finance        | A        | Simran Kesharwani       | PF2022-1045 | Failed to Clear |
| 141 | Finance        | B        | Stuti Beria             | PF2022-2046 | Cleared         |
| 142 | Finance        | C        | Suchita Sanghvi         | PF2022-3047 | Cleared         |
| 143 | Finance        | C        | Sukanya Roy Chaudhury   | PF2022-3114 | Failed to Clear |
| 144 | Finance        | B        | Sumit Kadam             | PF2022-2156 | Cleared         |
| 145 | Finance        | D        | Taher Telia             | PF2022-4095 | Cleared         |
| 146 | Finance        | A        | Tanmay Nandiwadekar     | PF2022-1096 | Cleared         |
| 147 | Finance        | D        | Tanvi Phutane           | PF2022-4048 | Cleared         |
| 148 | Finance        | A        | Tanvi Tambat            | PF2022-1049 | Failed to Clear |
| 149 | Finance        | B        | Tapasya Nerurkar        | PF2022-2050 | Cleared         |
| 150 | Finance        | C        | Tushar Bhoge            | PF2022-3157 | Failed to Clear |
| 151 | Finance        | B        | Tushar Sachdeva         | PF2022-2097 | Cleared         |
| 152 | Finance        | C        | Vaishnavi Farkade       | PF2022-3051 | Cleared         |
| 153 | Finance        | D        | Vedanthe Kale           | PF2022-4052 | Failed to Clear |
| 154 | Finance        | D        | Vidhi Puj               | PF2022-4053 | Cleared         |
| 155 | Finance        | A        | Vineet Gopal Singh Bist | PF2022-1159 | Cleared         |
| 156 | Finance        | D        | Vinita Bhagwani         | PF2022-4054 | Cleared         |
| 157 | Finance        | C        | Vinita Rohira           | PF2022-3055 | Cleared         |
| 158 | Finance        | B        | Warad Degwekar          | PF2022-2160 | Cleared         |
| 159 | Finance        | C        | Yash Shah               | PF2022-3098 | Cleared         |
| 160 | Finance        | A        | Yash Shashikant Landge  | PF2022-1131 | Cleared         |
| 161 | Finance        | D        | Yash Tulshyan           | PF2022-4099 | Failed to Clear |







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|---|-----------------|----------|----------------------------|-------------|---------|
| Batch 2020-22                                       |                 |          |                            |             |         |
| SR.   | Specialisation  | Division | Name of the Candidate      | Roll Number | Remarks |
| 162   | Human Resources | A        | Aakanksha Jadhav           | PH2022-1011 | Cleared |
| 164   | Human Resources | A        | Hinet Patil                | PH2022-1019 | Cleared |
| 165   | Human Resources | A        | Jhanvi Ajmani              | PH2022-1001 | Cleared |
| 168   | Human Resources | B        | Meghashree Nayak           | PH2022-2021 | Cleared |
| 169   | Human Resources | D        | Poornima Nagare            | PH2022-4014 | Cleared |
| 171   | Human Resources | A        | Preeti Goyal               | PH2022-1015 | Cleared |
| 172   | Human Resources | B        | Radhika Naik               | PH2022-2016 | Cleared |
| 173   | Human Resources | D        | Ritika Toshniwal           | PH2022-4004 | Cleared |
| 174   | Human Resources | B        | Sarthak Pathak             | PH2022-2010 | Cleared |
| 175   | Human Resources | C        | Shreya Vij                 | PH2022-3017 | Cleared |
| 176   | Human Resources | B        | Shruti Tambe               | PH2022-2006 | Cleared |
| 177   | Human Resources | D        | Sushree Subhanandini       | PH2022-4018 | Cleared |
| 179   | Human Resources | C        | Tushar Pandagre            | PH2022-3020 | Cleared |
| 181   | Human Resources | D        | Yesha Jhaveri              | PH2022-4009 | Cleared |
| 185   | Marketing       | B        | Abhinav Anchaliya          | PM2022-2042 | Cleared |
| 186   | Marketing       | B        | Afreen Khan                | PM2022-2002 | Cleared |
| 187   | Marketing       | C        | Akshay Dani                | PM2022-3019 | Cleared |
| 188   | Marketing       | D        | Akshay Karanke             | PM2022-4044 | Cleared |
| 190   | Marketing       | D        | Angika Roy                 | PM2022-4028 | Cleared |
| 191   | Marketing       | A        | Aniket Kalyankar           | PM2022-1021 | Cleared |
| 192   | Marketing       | A        | Anushree Satyanarayan Dash | PM2022-1029 | Cleared |
| 193   | Marketing       | A        | Ayush Joshi                | PM2022-1045 | Cleared |
| 194   | Marketing       | B        | Bhushan Dakhore            | PM2022-2046 | Cleared |
| 195   | Marketing       | C        | Deepthi Shelar             | PM2022-3031 | Cleared |
| 196   | Marketing       | B        | Devansh Jajodia            | PM2022-2022 | Cleared |
| 197   | Marketing       | C        | Divyam Jakhmola            | PM2022-3047 | Cleared |
| 198   | Marketing       | C        | Eshan Apte                 | PM2022-3023 | Cleared |
| 199   | Marketing       | C        | Frenzita Dsouza            | PM2022-3003 | Cleared |
| 200   | Marketing       | D        | Gauri Chandgude            | PM2022-4032 | Cleared |
| 201   | Marketing       | D        | Gautam Hegde               | PM2022-4048 | Cleared |
| 202   | Marketing       | D        | Harita Rawat               | PM2022-4060 | Cleared |
| 203   | Marketing       | D        | Ishita Daruka              | PM2022-4004 | Cleared |
| 205   | Marketing       | D        | Joel Mendes                | PM2022-4024 | Cleared |
| 206   | Marketing       | A        | Kirti Sonawane             | PM2022-1033 | Cleared |
| 207   | Marketing       | B        | Kritika Rathi              | PM2022-2006 | Cleared |
| 208   | Marketing       | B        | Maithil Naik               | PM2022-2050 | Cleared |
| 209   | Marketing       | C        | Maithily Barekal           | PM2022-3007 | Cleared |
| 210   | Marketing       | D        | Mansi Bhandari             | PM2022-4008 | Cleared |
| 212   | Marketing       | A        | Merushka Rao               | PM2022-1009 | Cleared |
| 213   | Marketing       | B        | Neha Mishra                | PM2022-2010 | Cleared |

*(Signature)*







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|---|----------------|----------|-----------------------|-------------|---------|
| Batch 2020-22                                       |                |          |                       |             |         |
| SR.   | Specialisation | Division | Name of the Candidate | Roll Number | Remarks |
| 214   | Marketing      | C        | Nidhi Mishra          | PM2022-3035 | Cleared |
| 215   | Marketing      | D        | Nikhil Bhati          | PM2022-4062 | Cleared |
| 216   | Marketing      | D        | Prajakta Jadhav       | PM2022-4036 | Cleared |
| 217   | Marketing      | C        | Prasad Phadtare       | PM2022-3051 | Cleared |
| 218   | Marketing      | A        | Priyanka Nanda        | PM2022-1013 | Cleared |
| 219   | Marketing      | B        | Rachel Vaz            | PM2022-2014 | Cleared |
| 220   | Marketing      | C        | Richa Singh           | PM2022-3015 | Cleared |
| 221   | Marketing      | A        | Rutuja Kholam         | PM2022-1037 | Cleared |
| 222   | Marketing      | D        | Sapna Johari          | PM2022-4016 | Cleared |
| 224   | Marketing      | D        | Saurao Dalvi          | PM2022-4052 | Cleared |
| 225   | Marketing      | C        | Shantanu Tawre        | PM2022-3061 | Cleared |
| 226   | Marketing      | C        | Shoaib Shaikh         | PM2022-3065 | Cleared |
| 227   | Marketing      | D        | Shreya Naidu          | PM2022-4066 | Cleared |
| 228   | Marketing      | A        | Shubham Deshpande     | PM2022-1053 | Cleared |
| 229   | Marketing      | B        | Shubham Karlewar      | PM2022-2054 | Cleared |
| 231   | Marketing      | A        | Shweta Pednekar       | PM2022-1017 | Cleared |
| 232   | Marketing      | B        | Siddhi Lanjekar       | PM2022-2038 | Cleared |
| 233   | Marketing      | C        | Supriya Sawant        | PM2022-3039 | Cleared |
| 234   | Marketing      | C        | Swapnil Kesare        | PM2022-3063 | Cleared |
| 235   | Marketing      | A        | Swapnil More          | PM2022-1057 | Cleared |
| 236   | Marketing      | B        | Tanu Arijariya        | PM2022-2018 | Cleared |
| 238   | Marketing      | C        | Tejas Parkar          | PM2022-3059 | Cleared |
| 240   | Marketing      | B        | Yash Pujari           | PM2022-2026 | Cleared |

Signature:

Faculty Name: Prof. Prakash Rathod



# Certificate of Completion

Certificate ID: 162014164837-

This is to acknowledge that **AAKAMSHI SALIAN**  
has completed courses required for BMC certification on May 14, 2021

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Bloomberg Market Concepts



# Certificate of Completion

Certificate ID: 162115119491

This is to acknowledge that **AAKARSH BEDI**  
has completed courses required for BMC certification on June 12, 2021

**Bloomberg  
for Education**

**BMC**  
Bloomberg Market Concepts

# Certificate of Completion

Certificate ID: 161942666087

This is to acknowledge that **AAYUSHI SHAH**  
has completed courses required for BMC certification on May 19, 2021

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# Certificate of Completion

Certificate ID: 162387052711

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has completed courses required for BMC certification on June 16, 2021

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# Certificate of Completion

Certificate ID: 161976527541

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**A.Y. 2020-21**  
**CERTIFICATION PROGRAM:**  
**CATEGORY III AIFs and PORTFOLIO**  
**MANAGEMENT SERVICES - Hedge**  
**Funds**



**CERTIFICATION PROGRAM:**  
**CATEGORY III AIFs and PORTFOLIO**  
**MANAGEMENT SERVICES**



## Course Overview:

The importance of Alternative Investments has grown rapidly in India in the last five years. With the growth in AUM of Alternative Investment Funds (AIFs), the demand for qualified professionals and fund managers has also increased correspondingly.

- Emerging Markets are gaining Private Investors' confidence, with Southeast Asia, China and India been ranked amongst the top 3 Most Preferred Destination by Global Investors, as per the Global Limited Partner Survey of Emerging Markets Private Equity Association, 2019 and 2020

Further, there are many other green pastures, yet to be explored in the Indian Alternative Investment space, such as:

- Liquid Alternative Investment Strategies, including REITs and InvITs
- Wine Funds
- Arts and Paintings
- Film Funds
- Green Bonds
- Stamps and Collectibles

Portfolio Managers provide services as a Discretionary Service, Non-discretionary Service or as an Advisor. Similarly, Category III AIFs serve as a Pooled Investment Vehicle (PIV) and are free to make risky investments, as compared to mutual funds, by taking derivative exposures and concentrated positions. The course focuses on the development of PMS and Category III AIFs in India, different fund structures, investment strategies deployed and the regulatory/taxation norms applicable to such funds. The course also provides an overview on the accounting processes, due diligence, valuation and performance attribution methods for these funds and their applicable regulations in India.

## Course Learning Outcomes:

- Understand risk-return profile of Alternative Investments, various asset classes within Alternative Investments and its growth history in the Indian and Global markets.
- Understand the structure of Category III AIFs in India, due diligence parameters and marketing process for Category III AIFs and PMS.
- Understand the kinds of Investment Strategies used by professional fund managers, the investment patterns, cash flows and returns.
- Identify different forms of PMS structures, and know how their performance attribution, accounting and valuation are done for different forms of investments.
- See the Regulatory and Taxation norms to boost investments in Category III AIFs and PMS, for the ultimate benefit of investors

## Pedagogy:

The course will be conducted through interactive online sessions, covering the key concepts along with in-class assignments, discussions and presentations. Additional readings will be provided for covering the contemporary aspects on an ongoing basis.

## **Interactive Learning and In-class Participation:**

For students to have an interactive learning experience, we will be providing the following:

- Live Quizzes – Get real-time feedback and output from the faculty
- Group Discussions – Join the assigned Break-out Rooms for live discussions on current case studies in the market

## **Exam and Certification:**

The participants will be required to appear for a Certification Test. The Certification Test can be attempted only once by the candidate. Upon successful completion of the Certification Test, all the participants shall be eligible to earn the **Certificate of Participation**.

### **Certification Test:**

Duration: 1 hour

Pattern of Questions: 50 Multiple Choice Questions (MCQs), of 2 marks each. Up to 25% of the questions shall be asked in the form of a case study.

Passing Marks: 50 marks, out of total 100 Marks. There shall be No Negative Marking.

### **Course Assessment:**

| <b>Particulars</b>  | <b>Weightage</b> |
|---|------------------|
| Continuous Evaluation – Live Quizzes and Group Discussion | 25%              |
| Certification Test  | 75%              |

### **Certificate of Participation:**

Participants who successfully clear the Certification Test shall be given the Certification of Participation, jointly issued by Career Topper Online Education Pvt. Ltd. (“CareerTopper”) and N.L. Dalmia Institute of Management Studies and Research (“NL Dalmia”)

## **Commercials:**

**Course Duration** – 25 Hours

**Fees** – Rs. 75000 (incl taxes) for Entire Program

## Proposed Topic Outline:

| TOPIC  | No. of Hours |
|--|--------------|
| <ul style="list-style-type: none"> <li>● <b>Introduction to Category III AIFs and PMS</b> <ul style="list-style-type: none"> <li>○ Characteristics of Category III AIFs and PMS</li> <li>○ Common Types of Alternative Investments</li> <li>○ Difference between Category III AIF, Mutual Fund and Portfolio Management Services</li> <li>○ Ecosystem - Market Participants and Service Providers in Category III AIF and PMS</li> <li>○ Role of Category III AIFs and PMS in Portfolio Diversification and as a Risk Management tool:                             <ul style="list-style-type: none"> <li>▪ Alpha Management</li> <li>▪ Beta Management</li> </ul> </li> <li>○ Growth of Category III AIFs and PMS in Global Markets – Pre and Post Global Financial Crisis and the impact of COVID-19</li> </ul> </li> </ul>  | <b>3.00</b>  |
| <ul style="list-style-type: none"> <li>● <b>Regulatory Landscape in India for Category III AIFs and PMS</b> <ul style="list-style-type: none"> <li>○ Distribution and Marketing of Category III AIFs and PMS</li> <li>○ SEBI (Alternative Investment Fund) Regulations                             <ul style="list-style-type: none"> <li>▪ Registration Process</li> <li>▪ Important Regulations and Investment Restrictions</li> </ul> </li> <li>○ SEBI (Portfolio Managers) Regulations                             <ul style="list-style-type: none"> <li>▪ Types of PMS and Services Offered</li> <li>▪ Investment Restrictions and Disclosures</li> </ul> </li> <li>○ Legal Entity and Formation of Category III AIFs and PMS</li> <li>○ Investment Agreements and Fund Documentation</li> <li>○ Components of Private Placement Memorandum (PPM)</li> <li>○ Disclosure Documents for PMS</li> </ul> </li> </ul> | <b>4.50</b>  |
| <ul style="list-style-type: none"> <li>● <b>Fund Structures and Fees</b> <ul style="list-style-type: none"> <li>○ Fee Structure and Cash Flow Distribution:                             <ul style="list-style-type: none"> <li>▪ Concepts of Additional Return, Carried-Interest, Hurdle Rate and Catch-up</li> <li>▪ Distribution Mechanisms and Case Studies</li> </ul> </li> <li>○ Common Fund Structures                             <ul style="list-style-type: none"> <li>▪ Onshore and Offshore Funds</li> <li>▪ Unified Structures and Co-investment Structures</li> <li>▪ Master-feeder Structures and Parallel Structures</li> </ul> </li> </ul> </li> </ul>   | <b>3.00</b>  |
| <ul style="list-style-type: none"> <li>● <b>Equity-based Investment Strategies and Case Studies:</b> <ul style="list-style-type: none"> <li>○ Investment Mandate and Investment Policy Statement</li> <li>○ Equity Long-only and Long-short Strategies</li> <li>○ Directional Strategies</li> <li>○ Pre-IPO Strategies</li> </ul> </li> </ul>  | <b>3.00</b>  |
| <ul style="list-style-type: none"> <li>● <b>Other Important Investment Strategies and Case Studies:</b> <ul style="list-style-type: none"> <li>○ Activist Strategy</li> <li>○ Merger Arbitrage Strategies</li> <li>○ Convertible Bond Arbitrage</li> <li>○ Systematic and Global Macro Strategies</li> </ul> </li> </ul>   | <b>2.00</b>  |



|  |              |
|--|--------------|
| <ul style="list-style-type: none"> <li>● <b>Valuation and Performance Attribution - Category III AIF</b> <ul style="list-style-type: none"> <li>○ Valuation of NAV</li> <li>○ Leverage – Tricks and Traps</li> <li>○ Gross IRR and Net IRR</li> <li>○ Risk and Return Measures</li> <li>○ Performance Attribution: <ul style="list-style-type: none"> <li>▪ Benchmarking and Monitoring Process</li> <li>▪ Liquidity Management and Risk Management</li> </ul> </li> <li>○ Importance of Third-party Registered Valuers</li> </ul> </li> </ul>         | <b>3.00</b>  |
| <ul style="list-style-type: none"> <li>● <b>Manager Selection and Due Diligence:</b> <ul style="list-style-type: none"> <li>○ Manager Selection Process for Category III Funds</li> <li>○ Investment Due Diligence</li> <li>○ Operational Due Diligence</li> <li>○ Use of Machine Learning and Artificial Intelligence</li> </ul> </li> </ul>  | <b>1.50</b>  |
| <ul style="list-style-type: none"> <li>● <b>Accounting and Investor Reporting:</b> <ul style="list-style-type: none"> <li>○ Accounting and Reporting: <ul style="list-style-type: none"> <li>▪ Components of NAV</li> <li>▪ Typical Balance sheet and P&amp;L items</li> </ul> </li> <li>○ Investor Disclosures and SEBI Disclosures</li> </ul> </li> </ul>  | <b>2.00</b>  |
| <ul style="list-style-type: none"> <li>● <b>Taxation:</b> <ul style="list-style-type: none"> <li>○ Tax Structure of Category III AIF and PMS: <ul style="list-style-type: none"> <li>▪ Trust-level Taxation</li> <li>▪ Funds set up as Special Purpose Vehicle</li> <li>▪ Taxation on Income from Capital Gains, Dividends and Interests</li> <li>▪ Withholding Taxes</li> <li>▪ Tax Structure for NRI compared to Domestic Investors</li> <li>▪ FATCA Requirements and KYC Documentation</li> <li>▪ Indirect Taxes</li> </ul> </li> </ul> </li> </ul> | <b>3.00</b>  |
| <b>TOTAL</b>   | <b>25.00</b> |

## **Trainer:**

**Mr. Archit Lohia – CFA, CA, CAIA, LLB**  
**Founder – CareerTopper**

Archit Lohia is a pioneer in Alternative Investments education and has founded CareerTopper, to provide professional development programs in Alternative Investments, through Customized Live Training Sessions and Corporate training Sessions in India. The start-up works for Indian Regulators, Banks, Mutual Funds, Foreign Universities, Start-up Accelerators and a number of Training Institutes and B-schools.

Archit has previously worked in Ernst & Young (EY) and Bombay Stock Exchange (BSE Ltd.) in areas, inter-alia including, Regulations, Compliance, IPO, Information Management Systems, Investment Analysis, Audit and Finance.

As his long-term vision, Archit is working towards improvising Deal Structuring and Ongoing Due Diligence process to ensure increased credibility and transparency in private deals. He is also involved in building a tech-based platform, which uses Artificial Intelligence and Machine Learning techniques in the Due Diligence and Background Investigation process. He is a member of IMDDA - Investment Management Due Diligence Association, USA and has gained prior experience in Due Diligence function, while handling the IPO process for Bombay Stock Exchange.

Archit is a Chapter Executive of the CAIA Association India Chapter and a Member of Expert Group formed by the Institute of Chartered Accountants of India (ICAI), for screening startups for their startup accelerator. He likes to write books and articles on the Alternative Investments industry and is a regular speaker at national and international forums. He loves playing cricket every Sunday as a stress-buster, apart from listening to music and travelling.



# N. L. Dalmia®

**Institute of Management Studies and Research**

(A School of Excellence of N. L. Dalmia Educational Society)

**Following Students Completed Certification Program: Category III AIFs and Portfolio Management Services - Hedge Funds Program A.Y 2020-21**

| Sr. No. | Specialisation | Name of the Candidate          | Student enrollment number |
|---------|----------------|--------------------------------|---------------------------|
| 1       | Finance        | Aakash Trideep Chakravorty     | PF1921-D67                |
| 2       | Finance        | Aarti Sardar Patel             | PF1921-D28                |
| 3       | Finance        | Abhishek Haridasan Nair        | PF1921-D46                |
| 4       | Finance        | Adwait Chandrakant Rode        | PF1921-D65                |
| 5       | Finance        | Ajinkya Prakash Khotalekar     | PF1921-D51                |
| 6       | Finance        | Alesh Vijay Ajmera             | PF1921-D71                |
| 7       | Finance        | Alyeen Sadruddin Khetani       | PF1921-D14                |
| 8       | Finance        | Amam Pramendra Mathur          | PF1921-D52                |
| 9       | Finance        | Ambika Govind Kale             | PF1921-D58                |
| 10      | Finance        | Ananya Mragank Nema            | PF1921-D27                |
| 11      | Finance        | Anish Ashok Devjani            | PF1921-D29                |
| 12      | Finance        | Anjan Soumen Chatterjee        | PF1921-D16                |
| 13      | Finance        | Ankit Amar Bajaj               | PF1921-D64                |
| 14      | Finance        | Ankita Kishor Patil            | PF1921-D12                |
| 15      | Finance        | Anmol Mahesh Bhat              | PF1921-D25                |
| 16      | Finance        | Arpita Jyotiprakash Roy        | PF1921-D38                |
| 17      | Finance        | Ashish Anil Bansal             | PF1921-D17                |
| 18      | Finance        | Burhanuddin Mustafa Daginawala | PF1921-D59                |
| 19      | Finance        | Charudatta Divakar Sarode      | PF1921-D69                |
| 20      | Finance        | Darshan Rajesh Dagli           | PF1921-D56                |
| 21      | Finance        | Deep Kamlesh Chitalia          | PF1921-D26                |
| 22      | Finance        | Devesh Kailash Advani          | PF1921-D70                |
| 23      | Finance        | Devki Devendra Parekh          | PF1921-D19                |
| 24      | Finance        | Digvijay Awadh Singh           | PF1921-D07                |
| 25      | Finance        | Diksha Natarajan Muthuswamy    | PF1921-D03                |
| 26      | Finance        | Gaurav Jashada Arjun           | PF1921-D35                |
| 27      | Finance        | Grishma Parag Sawant           | PF1921-D66                |
| 28      | Finance        | Hardik Arvind Jain             | PF1921-D68                |
| 29      | Finance        | Hardika Shailesh Gharat        | PF1921-D20                |
| 30      | Finance        | Jinesh Jayesh Chheda           | PF1921-D41                |
| 31      | Finance        | Jinita Akshay Bochia           | PF1921-D60                |
| 32      | Finance        | Jueeli Anand Kadam             | PF1921-D54                |
| 33      | Finance        | Kashish Chetan Khandheria      | PF1921-D42                |
| 34      | Finance        | Koutuk Ashok Mundada           | PF1921-D01                |
| 35      | Finance        | Manasi Rajesh Lapasiya         | PF1921-D53                |
| 36      | Finance        | Monica Dineshkumar Jangid      | PF1921-D23                |
| 37      | Finance        | Mrinal Rajesh Piralkar         | PF1921-D36                |
| 38      | Finance        | Natasha Octaviano Fernandes    | PF1921-D30                |
| 39      | Finance        | Omkar Milind Kadam             | PF1921-D11                |







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| Sr. No. | Specialisation | Name of the Candidate      | Student enrollment number |
|---------|----------------|----------------------------|---------------------------|
| 40      | Finance        | Palash Shailesh Shukla     | PF1921-D63                |
| 41      | Finance        | Prasanna Ashok Deshmukh    | PF1921-D22                |
| 42      | Finance        | Rahul Rajshekar Menon      | PF1921-D61                |
| 43      | Finance        | Raunak Jagdish Lalwani     | PF1921-D31                |
| 44      | Finance        | Ritesh Sunil Godambe       | PF1921-D24                |
| 45      | Finance        | Riya Deepak Kyal           | PF1921-D02                |
| 46      | Finance        | Riya Jayanti Rita          | PF1921-D43                |
| 47      | Finance        | Rushil Manish Dasadia      | PF1921-D72                |
| 48      | Finance        | Sahil Haresh Kataria       | PF1921-D32                |
| 49      | Finance        | Salim Akbarali Fancywala   | PF1921-D33                |
| 50      | Finance        | Sayli Vilasrao Bompilwar   | PF1921-D15                |
| 51      | Finance        | Sharon Charles Chandekar   | PF1921-D44                |
| 52      | Finance        | Shrenik Sharad Jain        | PF1921-D50                |
| 53      | Finance        | Shreya Shrikant Hasyagar   | PF1921-D40                |
| 54      | Finance        | Shubham Prakash Mohite     | PF1921-D13                |
| 55      | Finance        | Supriya Shivnarayan Singh  | PF1921-D10                |
| 56      | Finance        | Tanvi Shrikant Pawar       | PF1921-D47                |
| 57      | Finance        | Varsha Deepak Gajwani      | PF1921-D49                |
| 58      | Finance        | Vatsala Damodar Jajoo      | PF1921-D48                |
| 59      | Finance        | Visha Vipul Patel          | PF1921-D57                |
| 60      | Finance        | Yashvi Amit Jain           | PF1921-D39                |
| 61      | Finance        | Akhil Balakrishnan         | MG1921-A03                |
| 62      | Finance        | Kinjal Kamlesh Vora        | MG1921-A21                |
| 63      | Finance        | Adrija Bagchi              | MG1921-B01                |
| 64      | Finance        | Animesh                    | MG1921-A04                |
| 65      | Finance        | Agnivesh Anilkumar Singh   | MG1921-B02                |
| 66      | Finance        | Shyam Rupesh Parasrampurua | MG1921-A40                |
| 67      | Finance        | Durgesh Maniram Pandey     | MG1921-B09                |
| 68      | Finance        | Harsh Narendra Maskara     | MG1921-A15                |
| 69      | Finance        | Siddharth Mahendra Khut    | MG1921-B37                |
| 70      | Finance        | Abhishek Krishna Gosai     | MG1921-A02                |
| 71      | Finance        | Yash Nitesh Singhi         | MG1921-B44                |
| 72      | Finance        | Santosh Singh Rawat        | MG1921-A37                |
| 73      | Finance        | Yash Shantilal Bhansali    | MG1921-B45                |
| 74      | Finance        | Harsh Natraj Chandak       | MG1921-A16                |
| 75      | Finance        | Anjaney Singh              | MG1921-B06                |
| 76      | Finance        | Aayush Sanjeev Misra       | MG1921-A01                |
| 77      | Finance        | Akshi Anil Sharma          | MG1921-B05                |





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| Sr. No. | Specialisation | Name of the Candidate          | Student enrollment number |
|---------|----------------|--------------------------------|---------------------------|
| 78      | Finance        | Daga Raj Dharmendra            | MG1921-B08                |
| 79      | Finance        | Himashree Bhardwaj             | MG1921-A20                |
| 80      | Finance        | Rohit Udaybhan Singh           | MG1921-A34                |
| 81      | Finance        | Yash Mahesh Jhunjhunwala       | MG1921-B43                |
| 82      | Finance        | Urvashi Rajesh Sharma          | MG1921-B39                |
| 83      | Finance        | Anurag Rajendra Prasad Mishra  | MG1921-A06                |
| 84      | Finance        | Vivek Vinod Singh              | MG1921-B42                |
| 85      | Finance        | Harsh Suresh Khandelwal        | MG1921-A17                |
| 86      | Finance        | Sonal Ishwar Singh Bora        | MG1921-A41                |
| 87      | Finance        | Ravi Ramawatar Assawa          | MG1921-B31                |
| 88      | Finance        | Yash Anil Vijayvargiya         | MG1921-A44                |
| 89      | Finance        | Varun Nandkumar Bisen          | MG1921-B40                |
| 90      | Finance        | Gaurav Varkey Varghese         | MG1921-B11                |
| 91      | Finance        | Shantanu Krishna Dixit         | MG1921-A38                |
| 92      | Finance        | Shrivastava Munish Rajkumar    | MG1921-B36                |
| 93      | Finance        | Puneet Raina                   | MG1921-A28                |
| 94      | Finance        | Rahul Ramesh Gupta             | MG1921-A31                |
| 95      | Finance        | Vishal Chandrakant Bagadia     | MG1921-B41                |
| 96      | Finance        | Harsha Anil Goel               | MG1921-B12                |
| 97      | Finance        | Chaitanya Uday Vartak          | MG1921-A11                |
| 98      | Finance        | Avinash Sanjeev Singh          | MG1921-A08                |
| 99      | Finance        | Ojas Santosh Dudwadkar         | MG1921-A26                |
| 100     | Finance        | Mansi Sanjay Tripathi          | MG1921-A23                |
| 101     | Finance        | Dharti Umesh Pujare            | MG1921-A12                |
| 102     | Finance        | Rakesh Bholaram Choudhary      | MG1921-A32                |
| 103     | Finance        | Kruti Mukesh Gupta             | MG1921-B16                |
| 104     | Finance        | Rupam Kumari Sunil Kumar Singh | MG1921-A35                |
| 105     | Finance        | Bhagyashri Suresh Nigade       | MG1921-A10                |
| 106     | Finance        | Nishchay Mahendra Agarwal      | MG1921-B25                |
| 107     | Finance        | Akash Ramkishan Pal            | MG1921-B03                |
| 108     | Finance        | Rishika Vijay Todi             | MG1921-A33                |
| 109     | Finance        | Ravindrakumar Siyaram Pal      | MG1921-B32                |
| 110     | Finance        | Nehal Balkrishna Ghag          | MG1921-A24                |
| 111     | Finance        | Ankit Brahmadev Mishra         | MG1921-A05                |
| 112     | Finance        | Aryan                          | MG1921-B07                |
| 113     | Finance        | Pratiksha Tukaram Namaye       | MG1921-B28                |
| 114     | Finance        | Siddharth Manish Mengle        | MG1921-B38                |





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| Sr. No. | Specialisation | Name of the Candidate          | Student enrollment number |
|---------|----------------|--------------------------------|---------------------------|
| 115     | Finance        | Mohit Maheshwari               | MG1921-B19                |
| 116     | Finance        | Dhiraj Bideshi Singh           | MG1921-A13                |
| 117     | Finance        | Suwendu Sekhar Sanjay Kumar Pa | MG1921-A43                |
| 118     | Finance        | Ojas Dudhane                   | MG1921-B26                |
| 119     | Finance        | Sonali Bhagwati Prasad Sharma  | MG1921-A42                |
| 120     | Finance        | Shubhshankar Khandelwal        | MG1921-A39                |

Head of Accreditation

Prof. Dr. Vaishali Kulkarni







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**A.Y. 2020-21**  
**CERTIFICATION PROGRAM:**  
**CATEGORY I AIFs and CATEGORY II**  
**AIFs - Private Equity**



**CERTIFICATION PROGRAM:  
CATEGORY I AIFs and CATEGORY II AIFs**

## Course Overview:

Private Equity (PE) investments are a major source of growth capital to boost investments in early-stage as well as growth companies and create more jobs for economic development. Venture Capitalists (VCs) are willing to take the risk and provide startups the initial capital required to bootstrap their business models and onboard their first paying customers. Presence of a vibrant PE market is a signal of a fundamentally growing economy. The course focuses on Private Equity markets, fund structures, forms of private capital and its growth in the domestic as well as international markets. The course also provides an overview on the accounting processes, due diligence, valuation and performance attribution methods for these funds and their applicable regulations in India. Candidates will be able to grasp the developments in the Start-up Ecosystem, Start-up India initiatives, tax benefits and growth of India as a Start-up Hub.

## Course Learning Outcomes:

At the end of this course, the participants will be able to:

- Understand the structure of Alternative Investment Funds India, due diligence and marketing process for these funds.
- Understand risk-return profile of Alternative Investments, various asset classes within Alternative Investments and its growth history in the Indian and Global markets.
- Understand what is Private Equity, different types of Private Equity is and how the investment patterns, cash flows and returns are different from other traditional and alternative investments.
- Learn to negotiate with investors, when raising funds to start your own startup, while signing a term sheet.
- Identify equity and debt forms of Private Capital, and understand how performance attribution, accounting and valuation is done for different forms of investments and funds.
- Deep-dive into the regulatory landscape for Alternative Investment Funds at domestic and international level, including Private Equity, Hedge Funds and Venture Capital funds.
- See the Government initiatives taken to boost growth in Startups, Private Equity and Venture Capital and their impact on the investment and startup eco-system

## Pedagogy:

The course will be conducted through interactive online sessions, covering the key concepts along with in-class assignments, discussions and presentations. Additional readings will be provided for covering the contemporary aspects on an ongoing basis.

## Interactive Learning and In-class Participation:

For students to have an interactive learning experience, we will be providing the following:

- Live Quizzes – Get real-time feedback and output from the faculty
- Group Discussions – Join the assigned Break-out Rooms for live discussions on current case studies in the market



## Exam and Certification:

The participants will be required to appear for a Certification Test. The Certification Test can be attempted only once by the candidate. Upon successful completion of the Certification Test, all the participants shall be eligible to earn the **Certificate of Participation**.

### Certification Test:

Duration: 1 hour

Pattern of Questions: 50 Multiple Choice Questions (MCQs), of 2 marks each. Up to 25% of the questions shall be asked in the form of a case study.

Passing Marks: 50 marks, out of total 100 Marks. There shall be No Negative Marking.

### Course Assessment:

| Particulars   | Weightage |
|---|-----------|
| Continuous Evaluation – Live Quizzes and Group Discussion | 25%       |
| Certification Test  | 75%       |

### Certificate of Participation:

Participants who successfully clear the Certification Test shall be given the Certification of Participation, jointly issued by Career Topper Online Education Pvt. Ltd. (“CareerTopper”) and N.L. Dalmia Institute of Management Studies and Research (“NL Dalmia”)

## Commercials:

**Course Duration** – 25 Hours

**Fees** – Rs. 75000 (incl taxes) for Entire Program

## Proposed Topic Outline:

| TOPIC   | No. of Hours |
|---|--------------|
| <ul style="list-style-type: none"> <li>● <b>Introduction to Private Equity and Venture Capital</b> <ul style="list-style-type: none"> <li>○ Characteristics of Alternative Investments and Private Capital</li> <li>○ Common Types of Alternative Investments</li> <li>○ Stages of Private Equity – Studying the J-Curve Effect</li> <li>○ Ecosystem - Market Participants and Service Providers in Private Equity</li> <li>○ Role of Private Equity in Portfolio Diversification and as a Risk Management tool</li> <li>○ Growth of Private Equity in Global Markets – Pre and Post Global Financial Crisis and the impact of COVID-19</li> </ul> </li> </ul>  | <b>3.00</b>  |
| <ul style="list-style-type: none"> <li>● <b>Private Equity Fund Structure and Fee Structure</b> <ul style="list-style-type: none"> <li>○ Venture Capital Funds and Angel Funds</li> <li>○ Private Equity Fees and Cash Flow Distribution:                             <ul style="list-style-type: none"> <li>▪ Concepts of Catch-Up, Carried-Interest, Hurdle Rate and Clawback</li> <li>▪ Distribution Mechanisms and Case Studies</li> </ul> </li> <li>○ Common Fund Structures</li> <li>○ Investment Process and Portfolio Allocation</li> </ul> </li> </ul>   | <b>3.00</b>  |
| <ul style="list-style-type: none"> <li>● <b>Regulatory Landscape in India for Category I AIFs and Category II AIFs</b> <ul style="list-style-type: none"> <li>○ Distribution and Marketing of Category I AIFs and Category II AIFs</li> <li>○ SEBI (Alternative Investment Fund) Regulations                             <ul style="list-style-type: none"> <li>▪ Registration Process</li> <li>▪ Important Regulations and Investment Restrictions</li> </ul> </li> <li>○ Legal Entity and Formation of Category I AIFs and Category II AIFs</li> </ul> </li> </ul>  | <b>2.00</b>  |
| <ul style="list-style-type: none"> <li>● <b>Term Sheet Negotiations and Due Diligence</b> <ul style="list-style-type: none"> <li>○ Term Sheet Clauses                             <ul style="list-style-type: none"> <li>▪ Binding Clauses</li> <li>▪ Non-Binding Clauses</li> </ul> </li> <li>○ Investment Agreements, Side Letters and Role of Investment Committee</li> <li>○ Components of Private Placement Memorandum (PPM)</li> </ul> </li> </ul>  | <b>3.00</b>  |
| <ul style="list-style-type: none"> <li>● <b>Other Equity Forms of Private Capital</b> <ul style="list-style-type: none"> <li>○ Leveraged Buy-outs (LBOs)                             <ul style="list-style-type: none"> <li>▪ Types of Buyouts</li> <li>▪ Leveraged Buyouts Risk and Returns</li> </ul> </li> <li>○ Private Investments in Public Equity (PIPEs)                             <ul style="list-style-type: none"> <li>▪ Types of PIPEs</li> <li>▪ Risk and Return Measures</li> </ul> </li> <li>○ Exit Strategies for Private Equity                             <ul style="list-style-type: none"> <li>▪ Types of Exits</li> <li>▪ Deals and Exits Analysis</li> </ul> </li> <li>○ Private Debt                             <ul style="list-style-type: none"> <li>▪ Venture Debt</li> <li>▪ Mezzanine Debt, Distressed Debt and Special Situations Funds</li> </ul> </li> </ul> </li> </ul> | <b>3.00</b>  |
| <ul style="list-style-type: none"> <li>● <b>Valuation and Performance Attribution - Private Equity and Venture Capital</b> <ul style="list-style-type: none"> <li>○ Valuation of Private Equity using Income Approach and Market Approach</li> <li>○ Gross IRR and Net IRR of a Private Equity Fund</li> </ul> </li> </ul>  | <b>3.00</b>  |

|  |              |
|--|--------------|
| <ul style="list-style-type: none"> <li>○ Multiples – TVPI, DPI, RVPI and MOIC</li> <li>○ Risk Measures</li> <li>○ Enterprise Value and Equity Valuation of Investee Companies</li> <li>○ Performance Attribution: <ul style="list-style-type: none"> <li>▪ Benchmarking and Monitoring Process</li> <li>▪ Liquidity Management and Risk Management</li> </ul> </li> <li>○ Importance of Third-party Registered Valuers</li> </ul>  |              |
| <ul style="list-style-type: none"> <li>● <b>Accounting, Taxation and Fund Documentation:</b> <ul style="list-style-type: none"> <li>○ Accounting and Reporting: <ul style="list-style-type: none"> <li>▪ Components of NAV</li> <li>▪ Typical Balance sheet and P&amp;L items</li> </ul> </li> <li>○ Tax Structure: <ul style="list-style-type: none"> <li>▪ Taxation on Income from Capital Gains, Dividends and Interests</li> <li>▪ Withholding Taxes and Indirect Taxes</li> <li>▪ Difference in Taxation for Trust and LLP, Domestic and NRI Investors</li> <li>▪ FATCA Requirements and KYC Documentation</li> </ul> </li> </ul> </li> </ul> | <b>3.00</b>  |
| <ul style="list-style-type: none"> <li>● <b>Manager Selection and Due Diligence:</b> <ul style="list-style-type: none"> <li>○ Manager Selection Process for Category I and Category II Funds</li> <li>○ Screening Methodology of Start-ups</li> <li>○ Investment Due Diligence</li> <li>○ Operational Due Diligence</li> <li>○ Use of Machine Learning and Artificial Intelligence</li> </ul> </li> </ul>  | <b>2.00</b>  |
| <ul style="list-style-type: none"> <li>● <b>Start-up India and Growth of Private Equity in India:</b> <ul style="list-style-type: none"> <li>○ Key Statistics: Indian Start-up Ecosystem</li> <li>○ Government Initiatives: Start-up India Plan <ul style="list-style-type: none"> <li>▪ Overview of Start-up India Plan and Benefits to Start-ups</li> <li>▪ Taxation Benefits and other Regulatory Benefits</li> </ul> </li> </ul> </li> </ul>   | <b>3.00</b>  |
| <b>TOTAL</b>   | <b>25.00</b> |



## **Trainer:**

**Mr. Archit Lohia – CFA, CA, CAIA, LLB**  
**Founder – CareerTopper**

Archit Lohia is a pioneer in Alternative Investments education and has founded CareerTopper, to provide professional development programs in Alternative Investments, through Customized Live Training Sessions and Corporate training Sessions in India. The start-up works for Indian Regulators, Banks, Mutual Funds, Foreign Universities, Start-up Accelerators and a number of Training Institutes and B-schools.

Archit has previously worked in Ernst & Young (EY) and Bombay Stock Exchange (BSE Ltd.) in areas, inter-alia including, Regulations, Compliance, IPO, Information Management Systems, Investment Analysis, Audit and Finance.

As his long-term vision, Archit is working towards improvising Deal Structuring and Ongoing Due Diligence process to ensure increased credibility and transparency in private deals. He is also involved in building a tech-based platform, which uses Artificial Intelligence and Machine Learning techniques in the Due Diligence and Background Investigation process. He is a member of IMDDA - Investment Management Due Diligence Association, USA and has gained prior experience in Due Diligence function, while handling the IPO process for Bombay Stock Exchange.

Archit is a Chapter Executive of the CAIA Association India Chapter and a Member of Expert Group formed by the Institute of Chartered Accountants of India (ICAI), for screening startups for their startup accelerator. He likes to write books and articles on the Alternative Investments industry and is a regular speaker at national and international forums. He loves playing cricket every Sunday as a stress-buster, apart from listening to music and travelling.



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**Following Students Completed Certification Program: Category I AIFs and Category II AIFs - Private Equity Program A.Y 2020-21**

| Sr. No. | Specialisation | Name of the Candidate         | Student enrollment number |
|---------|----------------|-------------------------------|---------------------------|
| 1       | Finance        | Akhil Balakrishnan            | MG1921-A03                |
| 2       | Finance        | Kinjal Kamlesh Vora           | MG1921-A21                |
| 3       | Finance        | Adrija Bagchi                 | MG1921-B01                |
| 4       | Finance        | Animesh                       | MG1921-A04                |
| 5       | Finance        | Agnivesh Anilkumar Singh      | MG1921-B02                |
| 6       | Finance        | Shyam Rupesh Parasrampuria    | MG1921-A40                |
| 7       | Finance        | Durgesh Maniram Pandey        | MG1921-B09                |
| 8       | Finance        | Harsh Narendra Maskara        | MG1921-A15                |
| 9       | Finance        | Siddharth Mahendra Khut       | MG1921-B37                |
| 10      | Finance        | Abhishek Krishna Gosai        | MG1921-A02                |
| 11      | Finance        | Yash Nitesh Singhi            | MG1921-B44                |
| 12      | Finance        | Santosh Singh Rawat           | MG1921-A37                |
| 13      | Finance        | Yash Shantilal Bhansali       | MG1921-B45                |
| 14      | Finance        | Harsh Natraj Chandak          | MG1921-A16                |
| 15      | Finance        | Anjaney Singh                 | MG1921-B06                |
| 16      | Finance        | Aayush Sanjeev Misra          | MG1921-A01                |
| 17      | Finance        | Akshi Anil Sharma             | MG1921-B05                |
| 18      | Finance        | Daga Raj Dharmendra           | MG1921-B08                |
| 19      | Finance        | Himashree Bhardwaj            | MG1921-A20                |
| 20      | Finance        | Rohit Udaybhan Singh          | MG1921-A34                |
| 21      | Finance        | Yash Mahesh Jhunjhunwala      | MG1921-B43                |
| 22      | Finance        | Urvashi Rajesh Sharma         | MG1921-B39                |
| 23      | Finance        | Anurag Rajendra Prasad Mishra | MG1921-A06                |
| 24      | Finance        | Vivek Vinod Singh             | MG1921-B42                |
| 25      | Finance        | Harsh Suresh Khandelwal       | MG1921-A17                |
| 26      | Finance        | Sonal Ishwar Singh Bora       | MG1921-A41                |
| 27      | Finance        | Ravi Ramawatar Assawa         | MG1921-B31                |
| 28      | Finance        | Yash Anil Vijayvargiya        | MG1921-A44                |
| 29      | Finance        | Varun Nandkumar Bisen         | MG1921-B40                |
| 30      | Finance        | Gaurav Varkey Varghese        | MG1921-B11                |
| 31      | Finance        | Shantanu Krishna Dixit        | MG1921-A38                |
| 32      | Finance        | Shrivastava Munish Rajkumar   | MG1921-B36                |
| 33      | Finance        | Puneet Raina                  | MG1921-A28                |
| 34      | Finance        | Rahul Ramesh Gupta            | MG1921-A31                |
| 35      | Finance        | Vishal Chandrakant Bagadia    | MG1921-B41                |
| 36      | Finance        | Harsha Anil Goel              | MG1921-B12                |





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| Sr. No. | Specialisation | Name of the Candidate             | Student enrollment number |
|---------|----------------|-----------------------------------|---------------------------|
| 37      | Finance        | Chaitanya Uday Vartak             | MG1921-A11                |
| 38      | Finance        | Avinash Sanjeev Singh             | MG1921-A08                |
| 39      | Finance        | Ojas Santosh Dudwadkar            | MG1921-A26                |
| 40      | Finance        | Mansi Sanjay Tripathi             | MG1921-A23                |
| 41      | Finance        | Dharti Umesh Pujare               | MG1921-A12                |
| 42      | Finance        | Rakesh Bholaram Choudhary         | MG1921-A32                |
| 43      | Finance        | Kruti Mukesh Gupta                | MG1921-B16                |
| 44      | Finance        | Rupam Kumari Sunil Kumar Singh    | MG1921-A35                |
| 45      | Finance        | Bhagyashri Suresh Nigade          | MG1921-A10                |
| 46      | Finance        | Nishchay Mahendra Agarwal         | MG1921-B25                |
| 47      | Finance        | Akash Ramkishan Pal               | MG1921-B03                |
| 48      | Finance        | Rishika Vijay Todi                | MG1921-A33                |
| 49      | Finance        | Ravindrakumar Siyaram Pal         | MG1921-B32                |
| 50      | Finance        | Nehal Balkrishna Ghag             | MG1921-A24                |
| 51      | Finance        | Ankit Brahmadev Mishra            | MG1921-A05                |
| 52      | Finance        | Aryan                             | MG1921-B07                |
| 53      | Finance        | Pratiksha Tukaram Namaye          | MG1921-B28                |
| 54      | Finance        | Siddharth Manish Mengle           | MG1921-B38                |
| 55      | Finance        | Mohit Maheshwari                  | MG1921-B19                |
| 56      | Finance        | Dhiraj Bideshi Singh              | MG1921-A13                |
| 57      | Finance        | Suwendu Sekhar Sanjay Kumar Patra | MG1921-A43                |
| 58      | Finance        | Ojas Dudhane                      | MG1921-B26                |
| 59      | Finance        | Sonali Bhagwati Prasad Sharma     | MG1921-A42                |
| 60      | Finance        | Shubhshankar Khandelwal           | MG1921-A39                |
| 61      | Finance        | Aakash Trideep Chakravorty        | PF1921-D67                |
| 62      | Finance        | Aarti Sardar Patel                | PF1921-D28                |
| 63      | Finance        | Abhishek Haridasan Nair           | PF1921-D46                |
| 64      | Finance        | Adwait Chandrakant Rode           | PF1921-D65                |
| 65      | Finance        | Ajinkya Prakash Khotalekar        | PF1921-D51                |
| 66      | Finance        | Alesh Vijay Ajmera                | PF1921-D71                |
| 67      | Finance        | Alyeen Sadruddin Khetani          | PF1921-D14                |
| 68      | Finance        | Aman Pramendra Mathur             | PF1921-D52                |
| 69      | Finance        | Ambika Govind Kale                | PF1921-D58                |
| 70      | Finance        | Ananya Mragank Nema               | PF1921-D27                |
| 71      | Finance        | Anish Ashok Devjani               | PF1921-D29                |
| 72      | Finance        | Anjan Soumen Chatterjee           | PF1921-D16                |
| 73      | Finance        | Ankit Amar Bajaj                  | PF1921-D64                |







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| Sr. No. | Specialisation | Name of the Candidate          | Student enrollment number |
|---------|----------------|--------------------------------|---------------------------|
| 74      | Finance        | Ankita Kishor Patil            | PF1921-D12                |
| 75      | Finance        | Anmol Mahesh Bhat              | PF1921-D25                |
| 76      | Finance        | Arpita Jyotiprakash Roy        | PF1921-D38                |
| 77      | Finance        | Ashish Anil Bansal             | PF1921-D17                |
| 78      | Finance        | Burhanuddin Mustafa Daginawala | PF1921-D59                |
| 79      | Finance        | Charudatta Divakar Sarode      | PF1921-D69                |
| 80      | Finance        | Darshan Rajesh Dagli           | PF1921-D56                |
| 81      | Finance        | Deep Kamlesh Chitalia          | PF1921-D26                |
| 82      | Finance        | Devesh Kailash Advani          | PF1921-D70                |
| 83      | Finance        | Devki Devendra Parekh          | PF1921-D19                |
| 84      | Finance        | Digvijay Awadh Singh           | PF1921-D07                |
| 85      | Finance        | Diksha Natarajan Muthuswamy    | PF1921-D03                |
| 86      | Finance        | Gaurav Jashada Arjun           | PF1921-D35                |
| 87      | Finance        | Grishma Parag Sawant           | PF1921-D66                |
| 88      | Finance        | Hardik Arvind Jain             | PF1921-D68                |
| 89      | Finance        | Hardika Shailesh Gharat        | PF1921-D20                |
| 90      | Finance        | Jinesh Jayesh Chheda           | PF1921-D41                |
| 91      | Finance        | Jinita Akshay Bochia           | PF1921-D60                |
| 92      | Finance        | Jueeli Anand Kadam             | PF1921-D54                |
| 93      | Finance        | Kashish Chetan Khandheria      | PF1921-D42                |
| 94      | Finance        | Koutuk Ashok Mundada           | PF1921-D01                |
| 95      | Finance        | Manasi Rajesh Lapasiya         | PF1921-D53                |
| 96      | Finance        | Monica Dineshkumar Jangid      | PF1921-D23                |
| 97      | Finance        | Mrinal Rajesh Piralkar         | PF1921-D36                |
| 98      | Finance        | Natasha Octaviano Fernandes    | PF1921-D30                |
| 99      | Finance        | Omkar Milind Kadam             | PF1921-D11                |
| 100     | Finance        | Palash Shailesh Shukla         | PF1921-D63                |
| 101     | Finance        | Prasanna Ashok Deshmukh        | PF1921-D22                |
| 102     | Finance        | Rahul Rajshekar Menon          | PF1921-D61                |
| 103     | Finance        | Raunak Jagdish Lalwani         | PF1921-D31                |
| 104     | Finance        | Ritesh Sunil Godambe           | PF1921-D24                |
| 105     | Finance        | Riya Deepak Kyal               | PF1921-D02                |
| 106     | Finance        | Riya Jayanti Rita              | PF1921-D43                |
| 107     | Finance        | Rushil Manish Dasadia          | PF1921-D72                |
| 108     | Finance        | Sahil Haresh Kataria           | PF1921-D32                |
| 109     | Finance        | Salim Akbarali Fancywala       | PF1921-D33                |
| 110     | Finance        | Sayli Vilasrao Bompilwar       | PF1921-D15                |
| 111     | Finance        | Sharon Charles Chandekar       | PF1921-D44                |





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Following Students Completed Certification Program: Category I AIFs and Category II AIFs - Private  
Equity Program A.Y 2020-21

| Sr. No. | Specialisation | Name of the Candidate     | Student enrollment number |
|---------|----------------|---------------------------|---------------------------|
| 112     | Finance        | Shrenik Sharad Jain       | PF1921-D50                |
| 113     | Finance        | Shreya Shrikant Hasyagar  | PF1921-D40                |
| 114     | Finance        | Shubham Prakash Mohite    | PF1921-D13                |
| 115     | Finance        | Supriya Shivnarayan Singh | PF1921-D10                |
| 116     | Finance        | Tanvi Shrikant Pawar      | PF1921-D47                |
| 117     | Finance        | Varsha Deepak Gajwani     | PF1921-D49                |
| 118     | Finance        | Vatssala Damodar Jajoo    | PF1921-D48                |
| 119     | Finance        | Visha Vipul Patel         | PF1921-D57                |
| 120     | Finance        | Yashvi Amit Jain          | PF1921-D39                |

Head of Accreditation

Prof. Dr. Vaishali Kulkarni





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**A.Y. 2020-21**  
**WEALTH MANAGEMENT AND  
FINANCIAL PLANNING**



**CERTIFICATION PROGRAM:**

**WEALTH MANAGEMENT  
AND FINANCIAL PLANNING**



## **Course Overview:**

Wealth Management is more than just investment advice given by a financial advisor. It encompasses all parts of a client's financial life, starting from setting financial goals, earning return from investments, planning taxes and future expenses and finally transferring assets in succession planning. Financial Planning can help maintain a client's wealth and assist them in meeting their specific financial objectives, after providing for the investment constraints. Wealth Management plays a vital role in India, considering the demographic trends and investment returns in India.

### **Indian citizens have an inherent habit of making financial savings.**

- As much as 55% of working people in India are saving for retirement regularly, compared to 39% globally.
- 26% Indians are saving occasionally and 9% are not saving currently but do plan to do it in the future

### **Indian citizens are still adamant to explore investments in Equities and Mutual Funds**

- From a population of 1.3 billion, there are only 18 million investors in the equity market.
- Only 2 crore investors are investing in Mutual Fund Industry in India

With the lack of financial awareness and penetration in Indian Financial Markets, there is a great demand for qualified wealth managers, investment professionals and financial planners in India.

Indian citizens need to make financial goals, achieve investment objectives and plan for their retirement more efficiently. The course focuses on the development of Wealth Management industry and its role to enhance investments in the financial ecosystem. Candidates can learn how investment professionals understand risk appetite of clients and plan their investments in securities, insurance and retirement products.

## **Course Learning Outcomes:**

- Understand financial goals of clients and factors impacting their risk-return profile.
- Discuss the importance of retirement planning and estate planning, at an early stage.
- Highlight the process to transfer assets, in the Succession Planning process
- List various types of investment products, its associated risk-return characteristics and tax planning. Understand the implication of tax-savings and products used for tax planning.
- Discuss the investment selection process and allocation of funds to different asset classes.
- Understand different types of Insurance Policies, its terms and uses in planning children's future and client expenses
- Highlight the importance of investing in cross-border investments, to achieve diversification

## **Pedagogy:**

The course will be conducted through interactive online sessions, covering the key concepts along with in-class assignments, discussions and presentations. Additional readings will be provided for covering the contemporary aspects on an ongoing basis.

## **Interactive Learning and In-class Participation:**

For students to have an interactive learning experience, we will be providing the following:

- Live Quizzes – Get real-time feedback and output from the faculty
- Group Discussions – Join the assigned Break-out Rooms for live discussions on current case studies in the market

## **Exam and Certification:**

The participants will be required to appear for a Certification Test. The Certification Test can be attempted only once by the candidate. Upon successful completion of the Certification Test, all the participants shall be eligible to earn the **Certificate of Participation**.

### **Certification Test:**

Duration: 1.50 hours

Pattern of Questions: 75 Multiple Choice Questions (MCQs). 50 questions of 1 mark each and 25 questions of 2 marks each, in the form of a case study or item-set.

Passing Marks: 50 marks, out of total 100 Marks. There shall be No Negative Marking.

### **Course Assessment:**

| <b>Particulars</b>  | <b>Weightage</b> |
|---|------------------|
| Continuous Evaluation – Live Quizzes and Group Discussion | 25%              |
| Certification Test  | 75%              |

### **Certificate of Participation:**

Participants who successfully clear the Certification Test shall be given the Certification of Participation, jointly issued by Career Topper Online Education Pvt. Ltd. (“CareerTopper”) and N.L. Dalmia Institute of Management Studies and Research (“NL Dalmia”)

## **Commercials:**

**Course Duration** – 30 Hours

**Fees** – Rs. 90000 (incl taxes) for Entire Program

## Proposed Topic Outline:

| TOPIC   | No. of Hours |
|---|--------------|
| <ul style="list-style-type: none"> <li>● <b>Introduction to Wealth Management and Financial Planning:</b> <ul style="list-style-type: none"> <li>○ Wealth Management for Individuals</li> <li>○ Importance of Financial Planning and Reasons to manage Wealth</li> <li>○ Financial Planning Process and Role of a Financial Planner</li> <li>○ Key Market Participants in Wealth Management</li> <li>○ Risk Profiling of Clients</li> <li>○ Understanding Macro-economic Conditions conducive for clients:                             <ul style="list-style-type: none"> <li>▪ Economic Cycles</li> <li>▪ Monetary Policies and Fiscal Policies</li> <li>▪ Global Market Conditions and Sentiments</li> <li>▪ Key Economic Indicators</li> </ul> </li> <li>○ Growth of Wealth Management and Financial Planning in Global Markets – Pre and Post Global Financial Crisis and the impact of COVID-19</li> <li>○ Case Studies on Macro-economic Factors</li> </ul> </li> </ul> | <b>3.00</b>  |
| <ul style="list-style-type: none"> <li>● <b>Life Cycle Planning:</b> <ul style="list-style-type: none"> <li>○ Understanding Financial Goals of Clients</li> <li>○ Managing Liquidity</li> <li>○ Understanding the Networth Statement</li> <li>○ Key Financial Planning Areas – Why is it needed?</li> <li>○ Stages of Financial Planning and Wealth Management</li> <li>○ Common Pitfalls in Financial Planning</li> <li>○ Importance of Power of Compounding – As the Eighth Wonder of the World</li> <li>○ Case Studies</li> </ul> </li> </ul>  | <b>3.00</b>  |
| <ul style="list-style-type: none"> <li>● <b>Investment Planning:</b> <ul style="list-style-type: none"> <li>○ Investment Profiling and Types of Investors</li> <li>○ Investment Objectives:                             <ul style="list-style-type: none"> <li>▪ Return</li> <li>▪ Risk</li> </ul> </li> <li>○ Investment Constraints:                             <ul style="list-style-type: none"> <li>▪ Time Horizon</li> <li>▪ Taxation</li> <li>▪ Liquidity</li> <li>▪ Legal and Regulatory Considerations</li> <li>▪ Unique Preferences</li> </ul> </li> <li>○ Case Studies and Examples of Investment Planning</li> <li>○ Systematic Investment Plans (SIPs), Systematic Withdrawal Plans (SWPs) and Systematic Transfer Plans (STPs)</li> </ul> </li> </ul>  | <b>3.00</b>  |
| <ul style="list-style-type: none"> <li>● <b>Investment Management:</b> <ul style="list-style-type: none"> <li>○ Types of Investments                             <ul style="list-style-type: none"> <li>▪ Equity-based Investments and Equity-oriented Mutual Funds</li> <li>▪ Fixed Income Investments and Debt-oriented Mutual Funds</li> <li>▪ Fixed Deposits, PPFs and Low-risk Investments</li> <li>▪ Money Market Instruments</li> <li>▪ Gold Investments and Gold ETFs</li> <li>▪ Real-estate Investments</li> <li>▪ Private Equity and Venture Capital Investments</li> <li>▪ Other Alternative Investments</li> </ul> </li> </ul> </li> </ul>  | <b>4.50</b>  |

|  |             |
|--|-------------|
| <ul style="list-style-type: none"> <li>○ Understanding Risk-Return Trade-off</li> <li>○ Diversification Benefits</li> <li>○ Choice of a Client: Investors v/s Speculators</li> <li>○ Difference between Active Funds and Passive Funds. Growth of each Market</li> <li>○ Investment Analysis using Fundamental Analysis and Technical Analysis</li> <li>○ Strategic Asset Allocation v/s Tactical Asset Allocation</li> <li>○ Performance Attribution - Risk and Return Indicators</li> <li>○ Case Studies and Examples on Investment Management</li> </ul>  |             |
| <ul style="list-style-type: none"> <li>● <b>Risk Management through Insurance Planning and Children’s Future Planning:</b> <ul style="list-style-type: none"> <li>○ Importance of Insurance and Types of Insurance Plans</li> <li>○ Understanding Terms of Insurance Policies</li> <li>○ Types of Life Insurance Policies</li> <li>○ Health Insurance</li> <li>○ Unit Linked Insurance Plans (ULIPs)</li> <li>○ General Insurance</li> <li>○ Calculation of Policy Returns</li> <li>○ What is the Right Choice of Insurance, based on your Financial Goals?</li> <li>○ Children’s Future Planning <ul style="list-style-type: none"> <li>▪ Funding for Education</li> <li>▪ Children’s Marriage</li> </ul> </li> </ul> </li> </ul>                               | <b>3.00</b> |
| <ul style="list-style-type: none"> <li>● <b>Tax Planning:</b> <ul style="list-style-type: none"> <li>○ Role of Tax Planning and Objectives</li> <li>○ Types of Taxes paid on Return: <ul style="list-style-type: none"> <li>▪ Dividend Distribution Tax</li> <li>▪ Securities Transaction Tax</li> <li>▪ Capital Gain Tax</li> </ul> </li> <li>○ Methods of Tax Savings on Investment Returns</li> <li>○ Types of Tax Saving Schemes</li> <li>○ Tax Saving v/s Tax Evasion</li> <li>○ Tax Planning</li> <li>○ Importance of Professional Tax Planners and Advisors</li> </ul> </li> </ul>  | <b>3.00</b> |
| <ul style="list-style-type: none"> <li>● <b>Retirement Planning and Estate Planning:</b> <ul style="list-style-type: none"> <li>○ Benefits of Early Retirement Planning</li> <li>○ Setting Financial Goals for Retirement</li> <li>○ Investment Objectives and Constraints – To achieve Retirement Goals</li> <li>○ Importance of Estate Planning</li> <li>○ Asset Transfer: <ul style="list-style-type: none"> <li>▪ Nomination</li> <li>▪ Wills</li> <li>▪ Trust</li> </ul> </li> <li>○ Benefit of Asset Transfer through Will v/s Trust</li> <li>○ Role of Family Office Advisors</li> <li>○ Case Studies and Examples of Family Office Advisors</li> <li>○ Steps in Succession Planning</li> <li>○ Common Mistakes in Estate Planning</li> </ul> </li> </ul> | <b>3.00</b> |
| <ul style="list-style-type: none"> <li>● <b>Financial Planning as a Teen:</b> <ul style="list-style-type: none"> <li>○ Understanding Value for Money and taking responsibilities of Adulthood</li> <li>○ Managing Money Efficiently</li> <li>○ Planning for Family</li> <li>○ Cost and Benefit of Loans and Borrowings <ul style="list-style-type: none"> <li>▪ How to establish a Good Credit Score</li> </ul> </li> <li>○ Financial Exigencies</li> <li>○ New Investment Opportunities</li> </ul> </li> </ul>  | <b>2.00</b> |



|  |              |
|--|--------------|
| <ul style="list-style-type: none"> <li>● <b>Growth of Investments in International Equities and Global Indices:</b> <ul style="list-style-type: none"> <li>○ Identifying Major Investment Opportunities in Global Markets: <ul style="list-style-type: none"> <li>▪ ADRs, GDRs and Foreign Equities</li> <li>▪ Global Corporate Bonds and Government Bond Market</li> <li>▪ Emerging Market Equities</li> <li>▪ Investments in Illiquid Securities – Risk v/s Return</li> <li>▪ Other Alternative Investment Avenues</li> </ul> </li> <li>○ Major Indices for Global Performance Benchmarking</li> <li>○ Risk-Return Trade-off in International Traditional Investments</li> <li>○ Case Studies on Cross-border investments</li> </ul> </li> </ul> | <b>3.00</b>  |
| <ul style="list-style-type: none"> <li>● <b>In-class Assignment, Project Work and Research:</b> <ul style="list-style-type: none"> <li>○ Making Financial Goals and a Financial Plan based on that</li> <li>○ Short-listing potential investments based on historical returns, investment objectives and constraints</li> <li>○ Retirement Planning and Children’s Education Planning</li> </ul> </li> </ul>   | <b>2.50</b>  |
| <b>TOTAL</b>   | <b>30.00</b> |

## Trainer:

**Mr. Archit Lohia – CFA, CA, CAIA, LLB**  
**Founder – CareerTopper**

Archit Lohia is a pioneer in Alternative Investments education and has founded CareerTopper, to provide professional development programs in Alternative Investments, through Customized Live Training Sessions and Corporate training Sessions in India. The start-up works for Indian Regulators, Banks, Mutual Funds, Foreign Universities, Start-up Accelerators and a number of Training Institutes and B-schools.

Archit has previously worked in Ernst & Young (EY) and Bombay Stock Exchange (BSE Ltd.) in areas, inter-alia including, Regulations, Compliance, IPO, Information Management Systems, Investment Analysis, Audit and Finance.

As his long-term vision, Archit is working towards improvising Deal Structuring and Ongoing Due Diligence process to ensure increased credibility and transparency in private deals. He is also involved in building a tech-based platform, which uses Artificial Intelligence and Machine Learning techniques in the Due Diligence and Background Investigation process. He is a member of IMDDA - Investment Management Due Diligence Association, USA and has gained prior experience in Due Diligence function, while handling the IPO process for Bombay Stock Exchange.

Archit is a Chapter Executive of the CAIA Association India Chapter and a Member of Expert Group formed by the Institute of Chartered Accountants of India (ICAI), for screening startups for their startup accelerator. He likes to write books and articles on the Alternative Investments industry and is a regular speaker at national and international forums. He loves playing cricket every Sunday as a stress-buster, apart from listening to music and travelling.



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Following Students Completed Wealth Management And Financial Planning Program A.Y 2020-21

| Sr. No. | Specialisation | Name of the Candidate             | Student enrollment number |
|---------|----------------|-----------------------------------|---------------------------|
| 1       | Finance        | Shantanu Krishna Dixit            | MG1921-A38                |
| 2       | Finance        | Shrivastava Munish Rajkumar       | MG1921-B36                |
| 3       | Finance        | Puneet Raina                      | MG1921-A28                |
| 4       | Finance        | Rahul Ramesh Gupta                | MG1921-A31                |
| 5       | Finance        | Vishal Chandrakant Bagadia        | MG1921-B41                |
| 6       | Finance        | Harsha Anil Goel                  | MG1921-B12                |
| 7       | Finance        | Chaitanya Uday Vartak             | MG1921-A11                |
| 8       | Finance        | Avinash Sanjeev Singh             | MG1921-A08                |
| 9       | Finance        | Ojas Santosh Dudwadkar            | MG1921-A26                |
| 10      | Finance        | Mansi Sanjay Tripathi             | MG1921-A23                |
| 11      | Finance        | Dharti Umesh Pujare               | MG1921-A12                |
| 12      | Finance        | Rakesh Bholaram Choudhary         | MG1921-A32                |
| 13      | Finance        | Kruti Mukesh Gupta                | MG1921-B16                |
| 14      | Finance        | Rupam Kumari Sunil Kumar Singh    | MG1921-A35                |
| 15      | Finance        | Bhagyashri Suresh Nigade          | MG1921-A10                |
| 16      | Finance        | Nishchay Mahendra Agarwal         | MG1921-B25                |
| 17      | Finance        | Akash Ramkishan Pal               | MG1921-B03                |
| 18      | Finance        | Rishika Vijay Todi                | MG1921-A33                |
| 19      | Finance        | Ravindrakumar Siyaram Pal         | MG1921-B32                |
| 20      | Finance        | Nehal Balkrishna Ghag             | MG1921-A24                |
| 21      | Finance        | Ankit Brahmadev Mishra            | MG1921-A05                |
| 22      | Finance        | Aryan                             | MG1921-B07                |
| 23      | Finance        | Pratiksha Tukaram Namaye          | MG1921-B28                |
| 24      | Finance        | Siddharth Manish Mengle           | MG1921-B38                |
| 25      | Finance        | Mohit Maheshwari                  | MG1921-B19                |
| 26      | Finance        | Dhiraj Bideshi Singh              | MG1921-A13                |
| 27      | Finance        | Suwendu Sekhar Sanjay Kumar Patra | MG1921-A43                |
| 28      | Finance        | Ojas Dudhane                      | MG1921-B26                |
| 29      | Finance        | Sonali Bhagwati Prasad Sharma     | MG1921-A42                |
| 30      | Finance        | Akhil Balakrishnan                | MG1921-A03                |
| 31      | Finance        | Kinjal Kamlesh Vora               | MG1921-A21                |
| 32      | Finance        | Adrija Bagchi                     | MG1921-B01                |
| 33      | Finance        | Animesh                           | MG1921-A04                |
| 34      | Finance        | Agnivesh Anilkumar Singh          | MG1921-B02                |
| 35      | Finance        | Shyam Rupesh Parasrampuria        | MG1921-A40                |
| 36      | Finance        | Durgesh Maniram Pandey            | MG1921-B09                |
| 37      | Finance        | Harsh Narendra Maskara            | MG1921-A15                |
| 38      | Finance        | Siddharth Mahendra Khut           | MG1921-B37                |





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| Sr. No. | Specialisation | Name of the Candidate         | Student enrollment number |
|---------|----------------|-------------------------------|---------------------------|
| 39      | Finance        | Abhishek Krishna Gosai        | MG1921-A02                |
| 40      | Finance        | Yash Nitesh Singhi            | MG1921-B44                |
| 41      | Finance        | Santosh Singh Rawat           | MG1921-A37                |
| 42      | Finance        | Yash Shantilal Bhansali       | MG1921-B45                |
| 43      | Finance        | Harsh Natraj Chandak          | MG1921-A16                |
| 44      | Finance        | Anjaney Singh                 | MG1921-B06                |
| 45      | Finance        | Aayush Sanjeev Misra          | MG1921-A01                |
| 46      | Finance        | Akshi Anil Sharma             | MG1921-B05                |
| 47      | Finance        | Daga Raj Dharmendra           | MG1921-B08                |
| 48      | Finance        | Himashree Bhardwaj            | MG1921-A20                |
| 49      | Finance        | Rohit Udaybhan Singh          | MG1921-A34                |
| 50      | Finance        | Yash Mahesh Jhunjhunwala      | MG1921-B43                |
| 51      | Finance        | Urvashi Rajesh Sharma         | MG1921-B39                |
| 52      | Finance        | Anurag Rajendra Prasad Mishra | MG1921-A06                |
| 53      | Finance        | Vivek Vinod Singh             | MG1921-B42                |
| 54      | Finance        | Harsh Suresh Khandelwal       | MG1921-A17                |
| 55      | Finance        | Sonal Ishwar Singh Bora       | MG1921-A41                |
| 56      | Finance        | Ravi Ramawatar Assawa         | MG1921-B31                |
| 57      | Finance        | Yash Anil Vijayvargiya        | MG1921-A44                |
| 58      | Finance        | Varun Nandkumar Bisen         | MG1921-B40                |
| 59      | Finance        | Gaurav Varkey Varghese        | MG1921-B11                |
| 60      | Finance        | Shubhshankar Khandelwal       | MG1921-A39                |
| 61      | Finance        | Aakash Trideep Chakravorty    | PF1921-D67                |
| 62      | Finance        | Aarti Sardar Patel            | PF1921-D28                |
| 63      | Finance        | Abhishek Haridasan Nair       | PF1921-D46                |
| 64      | Finance        | Adwait Chandrakant Rode       | PF1921-D65                |
| 65      | Finance        | Ajinkya Prakash Khotalekar    | PF1921-D51                |
| 66      | Finance        | Alesh Vijay Ajmera            | PF1921-D71                |
| 67      | Finance        | Alyeen Sadruddin Khetani      | PF1921-D14                |
| 68      | Finance        | Aman Pramendra Mathur         | PF1921-D52                |
| 69      | Finance        | Ambika Govind Kale            | PF1921-D58                |
| 70      | Finance        | Ananya Mragank Nema           | PF1921-D27                |
| 71      | Finance        | Anish Ashok Devjani           | PF1921-D29                |
| 72      | Finance        | Anjan Soumen Chatterjee       | PF1921-D16                |
| 73      | Finance        | Ankit Amar Bajaj              | PF1921-D64                |
| 74      | Finance        | Ankita Kishor Patil           | PF1921-D12                |
| 75      | Finance        | Anmol Mahesh Bhat             | PF1921-D25                |
| 76      | Finance        | Arpita Jyotiprakash Roy       | PF1921-D38                |
| 77      | Finance        | Ashish Anil Bansal            | PF1921-D17                |







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| Sr. No. | Specialisation | Name of the Candidate          | Student enrollment number |
|---------|----------------|--------------------------------|---------------------------|
| 78      | Finance        | Burhanuddin Mustafa Daginawala | PF1921-D59                |
| 79      | Finance        | Charudatta Divakar Sarode      | PF1921-D69                |
| 80      | Finance        | Darshan Rajesh Dagli           | PF1921-D56                |
| 81      | Finance        | Deep Kamlesh Chitalia          | PF1921-D26                |
| 82      | Finance        | Devesh Kailash Advani          | PF1921-D70                |
| 83      | Finance        | Devki Devendra Parekh          | PF1921-D19                |
| 84      | Finance        | Digvijay Awadh Singh           | PF1921-D07                |
| 85      | Finance        | Raunak Jagdish Lalwani         | PF1921-D31                |
| 86      | Finance        | Ritesh Sunil Godambe           | PF1921-D24                |
| 87      | Finance        | Riya Deepak Kyal               | PF1921-D02                |
| 88      | Finance        | Riya Jayanti Rita              | PF1921-D43                |
| 89      | Finance        | Rushil Manish Dasadia          | PF1921-D72                |
| 90      | Finance        | Sahil Haresh Kataria           | PF1921-D32                |
| 91      | Finance        | Salim Akbarali Fancywala       | PF1921-D33                |
| 92      | Finance        | Sayli Vilasrao Bompilwar       | PF1921-D15                |
| 93      | Finance        | Sharon Charles Chandekar       | PF1921-D44                |
| 94      | Finance        | Shrenik Sharad Jain            | PF1921-D50                |
| 95      | Finance        | Shreya Shrikant Hasyagar       | PF1921-D40                |
| 96      | Finance        | Shubham Prakash Mohite         | PF1921-D13                |
| 97      | Finance        | Supriya Shivnarayan Singh      | PF1921-D10                |
| 98      | Finance        | Tanvi Shrikant Pawar           | PF1921-D47                |
| 99      | Finance        | Varsha Deepak Gajwani          | PF1921-D49                |
| 100     | Finance        | Vatssala Damodar Jajoo         | PF1921-D48                |
| 101     | Finance        | Visha Vipul Patel              | PF1921-D57                |
| 102     | Finance        | Yashvi Amit Jain               | PF1921-D39                |
| 103     | Finance        | Diksha Natarajan Muthuswamy    | PF1921-D03                |
| 104     | Finance        | Gaurav Jashada Arjun           | PF1921-D35                |
| 105     | Finance        | Grishma Parag Sawant           | PF1921-D66                |
| 106     | Finance        | Hardik Arvind Jain             | PF1921-D68                |
| 107     | Finance        | Hardika Shailesh Gharat        | PF1921-D20                |
| 108     | Finance        | Jinesh Jayesh Chheda           | PF1921-D41                |
| 109     | Finance        | Jinita Akshay Bochia           | PF1921-D60                |
| 110     | Finance        | Jueeli Anand Kadam             | PF1921-D54                |
| 111     | Finance        | Kashish Chetan Khandheria      | PF1921-D42                |
| 112     | Finance        | Koutuk Ashok Mundada           | PF1921-D01                |
| 113     | Finance        | Manasi Rajesh Lapasiya         | PF1921-D53                |
| 114     | Finance        | Monica Dineshkumar Jangid      | PF1921-D23                |
| 115     | Finance        | Mrinal Rajesh Piralkar         | PF1921-D36                |
| 116     | Finance        | Natasha Octaviano Fernandes    | PF1921-D30                |
| 117     | Finance        | Omkar Milind Kadam             | PF1921-D11                |







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| Sr. No. | Specialisation | Name of the Candidate   | Student enrollment number |
|---------|----------------|-------------------------|---------------------------|
| 118     | Finance        | Palash Shailesh Shukla  | PF1921-D63                |
| 119     | Finance        | Prasanna Ashok Deshmukh | PF1921-D22                |
| 120     | Finance        | Rahul Rajshekar Menon   | PF1921-D61                |

Head of Accreditation

Prof. Dr. Vaishali Kulkarni





# **N. L. Dalmia<sup>®</sup>** **Institute of Management Studies and Research**

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**A.Y. 2020-21**  
**Alumni Mentoring (35 Hours)**

## **Alumni Mentorship Program**

**“Mentoring is a brain to pick, an ear to listen, and a push in the right direction.” –  
John Crosby**

A perfect definition of what a mentor is and a philosophy strongly adhered to and followed by the Institute. Today’s Competitive scenario needs that the student not only is qualified with the academic knowledge but also with the requisite skills needed for the Industry. As the Industry Scenario in India becomes more and more dynamic and is undergoing a continuous change, it is a herculean challenge to get the students polished and ready for the Corporate world within the 2 years of education.

Through its self designed scientific method of evaluation, the Mentorship program quantifies the quality parameters of the student and gives a starting point to the Mentors to work on their respective mentees.

At the same time, the Mentor does the evaluation of a Mentee’s personality and skillsets. This helps the Mentor to not only understand his mentee but also his style of thinking and his attitude and his personality. Accordingly, by the Gap Analysis, mentor understands the shortfall or the limitations in his mentee, accordingly mentor starts giving the requisite inputs and the direction through the strength areas of the Mentee.

### **Mentor Benefits**

Both the mentor and the mentee give and grow in the mentoring process. The mentor, have the opportunity to review your accomplishments and challenges, as a reminder of lessons learned. In sharing your expertise you are leaving a legacy and guiding another’s career path. This also gives you an opportunity to review and reenergize your personal career goals.

the Mentor will get many benefits from this experience. Here are just a few additional benefits you might consider:

- Personal satisfaction in helping someone grow professionally

- Learning from the Mentee
- Building new Relationships
- Developing your skill as a “teacher”—helping someone clarify their career goals
- Developing your skill as a “guide” – helping someone navigate the waters of the organization
- Developing your skill as an “advisor” – helping someone find their strengths and weaknesses
- Receiving recognition
- Future pay-offs

As you reflect on being a mentor, think about who you would like as a mentee and what you would like to impart to them. This is, after all, going to be a partnership.

- Do you want someone who seems to be following your same career path?
- Do you want someone who has skills that you have strengths in?
- Do you want someone who has different or similar skills as you?
- Do you want someone who has an interest in similar skills and knowledge as you, but does not possess those competencies now?
- Do you want someone who is motivated by upward mobility?

Use the above questions to help you respond to the questions on the Mentor Application.

## **Mentor Roles and Responsibilities**

Development of your mentee depends on exploring career aspirations, strengths and weaknesses, collaborating on means to “get there,” implementing strategies, and evaluating along the way. You as the mentor provide the “light” for the mentee to follow. Sharing your wisdom and past experiences is what the mentee looks for from you.

### **Here are a few roles and responsibilities to help you in the process:**

- Support the mentee’s development of professional and interpersonal competencies through strategic questioning, goal setting, and planning
- Create a supportive and trusting environment
- Agree to, and schedule uninterrupted time with your mentee



- Stay accessible, committed and engaged during the length of the program
- Actively listen and question
- Give feedback to the mentee on his/her goals, situations, plans and ideas
- Encourage your mentee by giving them genuine positive reinforcement
- Serve as a positive role model
- Provide frank (and kind) corrective feedback if necessary
- Openly and honestly share “lessons learned” from your own experience
- Keep discussions on track
- Respect your mentee’s time and resources
- Participate in the scheduled events for the program:
- Seek assistance if questions arise that you cannot answer

### **Steps of Mentorship:**

#### **Opening Meeting**

Mentees and mentors will conduct their first in-person, one-on-one meeting. They may want to focus on the following:

- What are the roles and responsibilities of mentors and mentees?
- What does a successful mentoring relationship look like from your point of view?
- What are the mentor’s and mentee’s goals for the program experience?
- What should we do in preparation for our next full meeting

#### **Review Meeting:**

At the half-way point, you should assemble your mentoring pairs to learn how they are progressing and ask them to share things they’ve learned and the ways they’ve learned them. This is a great opportunity to also ask for and receive feedback on program policies and procedures to ensure the program remains effective.

#### **Closing Meeting**

formally mark the closure of the formal mentoring relationships. And it’s another great opportunity to ask for and receive feedback on the program.

## **Duration of the mentoring relationships**

Formal pairings need time for the relationship to develop. Pairings should last at least six months. Although mentoring relationships can be effective for several years, you should limit the formal pairing within the program to no more than six months.

## **Timeline for Mentorship Program PGHR Sem III:**

| <b>Sr. No.</b> | <b>Activities</b>                        | <b>Timeline</b>                                       |
|----------------|--|---|
| 1              | Opening Meeting and setting expectations | 1 <sup>st</sup> August - 10 <sup>th</sup> August      |
| 2              | Mid-Review meeting                       | 30 <sup>th</sup> September - 10 <sup>th</sup> October |
| 3              | Closing meeting                          | 20 <sup>th</sup> November - 30 <sup>th</sup> November |

## **Communication Strategy**

Mentors can communicate to their mentee through various communication channels which are mutually agreed such as:

- Face-to-face meetings(if mutually convenient)
- Email
- Telephonic conversation
- other online platform

The above channels of communications can be used for meeting and discussing the mentoring plan and also to provide information and updates to the mentee.

## **Effective Questioning**

As a Mentor, it can be very easy to want to just jump in and solve your Mentee's problems for him/ her. However, your role is to help the Mentee think for him/herself and to do so, this involves you asking thought-provoking questions. Help your partner self-discover. Questions should usually be open-ended questions: Questions that can't be answered with a one-word answer.

You can be a Questioning Coach. Using questions to help your mentee reflect on their experiences and learn from yours. Being a questioning coach gives you, the mentor, an opportunity to:

- Uncover additional facts and information about your mentee
- Confirm your mentee's goals, aspirations, and needs
- Explore strong feeling about situations
- Define problems and possible solutions
- Discover your mentee's commitment to their growth

**Exploratory questions – to assess the real issues and gain greater understanding:**

- What are the most interesting aspects of your job?
- Why did you pick this to concentrate on?
- What do you want to gain?
- What do you want to be known for?
- What do you understand the issue to be?
- What tells you that your assessment is correct? What are other people's perceptions of this issue?
- What assumptions are you making here?
- What other ideas do you have?
- How long has this been an issue?
- What did you learn from past experiences that you didn't expect to learn?
- What are the reasons behind an issue?
- Have you tried to resolve this issue before? Why or why not? If yes, what was the result?
- What choices do you have?
- What progress have you made?
- What other ideas do you have?
- How are you using the things/ideas we've spoken about?
- What results are you looking for?

**Empowering questions – to assist the Mentee to think for him/herself:**

- What are the skills you want to develop?
- What strategies come to mind when looking at a situation?
- What do you see as possible solutions here?
- What outcomes are you after here? Are these outcomes reasonable given the circumstances?
- What resources are available to help you move forward?
- What key players do you need help from?
- What forces may help and/or hinder you?
- What other information do you need to arrive at a solution?
- What are the pros and cons of each solution?
- What is the first step you need to take to achieve your preferred outcome?
- What alternative strategies should you develop?
- How will you know you have mastered or successfully enhanced a competency?
- How will you apply your new skill?

Ask more questions to really understand the responses you've been given. Rephrase the answer to ensure you have heard the reply correctly.

Most importantly—Ask more questions & give fewer answers. Remember, he who speaks the most learns the most!



## **Giving Feedback—Checklist for Mentors**

Think of feedback as a teaching/counseling opportunity. Exhibit positive or neutral body language when you are meeting the mentee physically.

### **Do use:**

Use "I" statements. Give examples from your experience.

Don't say, "but" or "however".

Avoid statements that describe someone instead of their actions

Ensure feedback is specific.

Give the other person an opportunity to ask questions or share their viewpoint.

Listen – carefully not only to the words but to the feelings and body language of the speaker. Don't become defensive.

Don't interrupt when the other person is responding.

Allow time and privacy for feedback- avoid/minimize distractions, set aside uninterrupted time for your feedback session.

### **Help your mentee plan for the next steps. Ask questions such as:**

What is a step you can do to reach your desired outcome?

What are some ways you can think of to resolve this challenge?

What resources are available to you?



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**Following Students Attended Alumni Mentoring Program A.Y 2020-21**

| Sr. No. | Specialisation | Name of the Candidate    | Student enrollment number |
|---------|----------------|--------------------------|---------------------------|
| 1       | HR             | Aanal Dharmesh Mehta     | PH1921-E05                |
| 2       | HR             | Aashika Anand Newar      | PH1921-E19                |
| 3       | HR             | Akanksha Hanuman Kumawat | PH1921-E02                |
| 4       | HR             | Anjana Pravim Tiwari     | PH1921-E17                |
| 5       | IIR            | Ankita Deepak Kerlia     | PH1921-E11                |
| 6       | HR             | Ayushi Vinod Agrawal     | PH1921-E15                |
| 7       | HR             | Clovette Clyde Murzello  | PH1921-E03                |
| 8       | HR             | Farhan Mohammed Shaikh   | PH1921-E16                |
| 9       | HR             | Ishita Sunil Vasudeva    | PH1921-E06                |
| 10      | HR             | Meghavi Parag Solanki    | PH1921-E01                |
| 11      | HR             | Mitesh Shamkant Duraphe  | PH1921-E07                |
| 12      | HR             | Palvi Lalitkumar Edake   | PH1921-E14                |
| 13      | IIR            | Prajakta Anil Jha        | PH1921-E04                |
| 14      | HR             | Pranjal Yuvraj Mundhe    | PH1921-E20                |
| 15      | HR             | Radhika Ravindra Natu    | PH1921-E10                |
| 16      | HR             | Resham Piyush Thakkar    | PH1921-E08                |
| 17      | HR             | Rhea Anand Hajare        | PH1921-E12                |
| 18      | HR             | Sakshi Sanjay Tiwari     | PH1921-E13                |
| 19      | HR             | Shikha Brijbhushan Singh | PH1921-E09                |
| 20      | HR             | Shrutika Somnath Taware  | PH1921-E18                |

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**A.Y. 2020-21**  
**NLP Foundation Course**

# NLP Foundation Course

Trainee's Manual

**Kiran moi Padhi**

Emerge Transformation

Life Mastery Coach | NLP Master Practitioner | Law of Attraction & Mindfulness Expert  
Emotional Intelligence & Leadership Coach

[coachkiranpadhi@gmail.com](mailto:coachkiranpadhi@gmail.com)

93260 35321



|  |           |
|--|-----------|
| <b>Your Goals for this training</b>                | <b>2</b>  |
| <b>Introduction to NLP</b>                         | <b>3</b>  |
| <b>Presuppositions of NLP</b>                      | <b>4</b>  |
| <b>NLP Frames</b>                                  | <b>7</b>  |
| <b>Goals &amp; Strategy - Well Formed Outcomes</b> | <b>16</b> |
| <b>Goals &amp; Strategy - Time Line Technique</b>  | <b>20</b> |
| <b>Internal Representations</b>                    | <b>22</b> |
| <b>Rapport Building</b>                            | <b>29</b> |
| <b>Anchors</b>                                     | <b>33</b> |
| <b>Values and Value Realignment</b>                | <b>37</b> |

Then when you have stepped into the circle, amplify the state. Step back and out of the imaginary circle and leave the feelings inside the circle when you feel the intensity of the state reaching its peak or just about to start declining. Repeat this process for each of the desired states.

After this you may, if you want add an auditory (speaking out a specific word) & a kinesthetic (performing a gesture) stimulus to that anchor as well.

This will build a resource state that is anchored to an imaginary circle visually, to a word spoken out auditorily and to a gesture kinesiethetically. Having learnt to do this you can access any desirable emotional state whenever you want to.

### Integrating Anchors/Collapse Anchors

Just as positive states can be anchored, so can negative states also be anchored.

One very interesting application of anchoring is the idea of integrating /collapsing anchors, so that an unresourceful / challenging state can very elegantly be overcome by collapsing it with a resourceful state.

This is a really powerful NLP process and you can easily use collapsing anchors for yourself too.

Let's take a look at the overview for this technique:

1. Decide on a mildly negative state or behaviour that the person wishes to overcome.
2. Ask the person to recall a series of positive states or experiences, and anchor each one.
3. Stack the anchors in the same place, like on the knuckle. For example when they felt powerful, when they knew they could have it all, when they really confidently or whatever positive states that they do really well.
4. Anchor the negative state once, on the knuckles next to the stack of positive states.
5. Fire anchors at the same time until they peak, and the integration is complete. (Watch the client, they will usually exhibit signs of asymmetry until the integration is complete).
6. Release the negative anchor.
7. Hold the positive anchor for 5 seconds and then release.
8. Test: "Now how do you feel about that old state?"
9. Future Pace: "Can you imagine a time in the future when you might be in a similar situation, and what happens?"

## VALUES & VALUE REALIGNMENT

List of Human values that guide our actions and results in life.

Identify your top 7-10 values

|                |                |                     |                 |
|----------------|----------------|---------------------|-----------------|
| Abundance      | Creativity     | Innovation          | Punctuality     |
| Acceptance     | Credibility    | Inspiration         | Quality         |
| Accountability | Curiosity      | Intelligence        | Realibility     |
| Achievement    | Daring         | Intuition           | Recognition     |
| Advancement    | Decisiveness   | Joy                 | Recognition     |
| Appreciation   | Dedication     | Kindness            | Responsiveness  |
| Attractiveness | Diversity      | Knowledge           | Risk-taking     |
| Autonomy       | Ethics         | Loyalty             | Security        |
| Balance        | Expressiveness | Making a difference | Self-control    |
| Boldness       | Family         | Motivation          | Service         |
| Brilliance     | Flexibility    | Optimism            | Simplicity      |
| Calmness       | Flexibility    | Optimism            | Spirituality    |
| Caring         | Flexibility    | Passion             | Stability       |
| Challenge      | Freedom        | Peace               | Thankfulness    |
| Charity        | Fun            | Perfection          | Trustworthiness |
| Cheerfulness   | Generosity     | Performance         | Uniqueness      |
| Cleverness     | Grace          | Playfulness         | Versatility     |
| Commitment     | Growth         | Popularity          | Vision          |
| Community      | Happiness      | Power               | Warmth          |
| Compassion     | Health         | Preparedness        | Wealth          |
| Consistency    | Honesty        | Proactive           | Well being      |
| Contribution   | Humility       | Proactivity         | Wisdom          |
| Cooperation    | Humor          | Professionalism     |                 |

### **Value Realignment (for behavioral shift)**

1. Step into a Context : An undesirable or un-resourceful situation
2. What is the top value you hold on to in that context (say Value A)
3. Step out of Context :

Take a deep breath and physically step back

4. Identify a value that you can realign in this situation (say Value B)
5. Future pace and load Value B by stepping into a movie of the future context where you are displaying Value B

## OPTION 1

**20 - 22 hour module**

**No. of days - 3 hrs X 7 days OR 2 hrs X 11 days**

**Includes :**

Concepts, Techniques, group activity/implentation, home study and Assignments  
Study Material and Completion Certificate (Certificate post assignments completion)

*Commercials : 25K + GST*

|    |   |
|----|---|
| 1  | Your Goals for this training            |
| 2  | Introduction to NLP                     |
| 3  | Presuppositions of NLP                  |
| 4  | NLP Frames                              |
| 5  | Mercedes Model of Human Experience      |
| 6  | Goals & Strategy - Well Formed Outcomes |
| 7  | Goals & Strategy - Time Line Technique  |
| 8  | Communication Model of Mind             |
| 9  | Internal Representations                |
| 10 | Rapport Building                        |
| 11 | Anchors                                 |
| 12 | Visual Swish                            |
| 13 | New Behavior Generator                  |
| 14 | Values and Realignment                  |
| 15 | Meta Model                              |
| 16 | Conversational Hypnosis - Milton Model  |



## OPTION 2

|  |
|--|
| <b>16 -18 hour module</b>  |
| <b>No. of days - 3 hrs X 6 days OR 2 hrs X 9 days</b>                                      |
| <b>Includes :</b>  |
| <b>Concepts, Techniques, group activity/implentation, home study and Assignments</b>       |
| <b>Study Material and Completion Certificate (Certificate post assignments completion)</b> |
| <b>Commercials : 20K + GST</b>   |

|    |   |
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### OPTION 3

|  |
|--|
| <b>8 - 10 hour Module</b>  |
| <b>No. of Days - 2 hrs X 5 days</b>  |
| <b>Includes :</b>  |
| <b>Concepts, Techniques, group activity/implentation, home study and Assignments</b>       |
| <b>Study Material and Completion Certificate (Certificate post assignments completion)</b> |
| <b>Commercials : 15K + GST</b>   |

|    |   |
|----|---|
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| 6  | Goals & Strategy - Time Line Technique  |
| 7  | Internal Representations                |
| 8  | Rapport Building                        |
| 9  | Anchors                                 |
| 10 | Values and Realignment                  |

## EMERGE TRANSFORMATION

1102, Royale B, Neelkanth Palms, Thane west - 400610

Original for Recipient

Tel: +91 93260 35321

GSTIN: 27BBIPP2608F1ZP

### Tax Invoice

Invoice No: 18/20-21

Invoice date: 13 October 2020

State: Maharashtra

#### Bill to Party

Name: N. L. Dalmia Institute of Management Studies and Research

Address: Srishti, Sector 1, Mira Road (E), Thane (MMR) 401107

GST: NA

State: Maharashtra

| S. No.                                       | Program Description                   | Rate  | Taxable amount | CGST                           |        | SGST |        | Total |
|--|---------------------------------------|-------|----------------|--------------------------------|--------|------|--------|-------|
|  |                                       |       |                | Rate                           | Amount | Rate | Amount |       |
| 1  | NLP Foundation Course -<br>1 Sep 2020 | 13500 | 13500          | 9%                             | 1215   | 9%   | 1215   | 15930 |
| <b>Total</b>                                 |                                       |       |                |                                |        |      |        | 15930 |
| <b>Total invoice amount in words</b>         |                                       |       |                | <b>Total Amount before Tax</b> |        |      |        | 13500 |
| Fifteen thousand and nine hundred and thirty |                                       |       |                | <b>Add: CGST</b>               |        |      |        | 1215  |
|  |                                       |       |                | <b>Add: SGST</b>               |        |      |        | 1215  |
|  |                                       |       |                | <b>Total Tax Amount</b>        |        |      |        | 2430  |
|  |                                       |       |                | <b>Total Amount after Tax:</b> |        |      |        | 15930 |
|  |                                       |       |                | <b>GST on Reverse Charge</b>   |        |      |        | 0     |

#### Bank Details

Name : Emerge Transformation  
A/c No - 092705000827  
Thane (Vasant Vihar) Branch  
Emerald Plaza, Hiranandani Medows  
IFSCode : ICIC0000927  
Current Account

Terms & conditions: NA

Certified that the particulars given above are true and correct

For Emerge Transformation

Kiran Padhi

Authorised signatory

**HR SEMESTER - II  
ATTENDANCE SHEET**

| Sr No. | Date        | Name of Webinar                         | Conducted By          | Facilitator           | Student Absent                      |
|--------|-------------|---|-----------------------|-----------------------|-------------------------------------|
| 1      | 14-May-2020 | HR response to covid -19                | Ms. Sreerupa Sengupta | Prof. Caral Dcunha    | Clovette Muzrello                   |
| 2      | 27-May-2020 | Preparing leaders post covid            | Dr. R Krishna Murthy  | Prof. Ulhas Deshpande | All present                         |
| 3      | 5-Jun-2020  | Corporate                               | Ms. Reena Wadkar      | Mrs. Sajita Pradeep   | Clovette Murzello                   |
| 4      | 14-Jun-2020 | Employee Engagement                     | Mr. Prashant Gautam   | Prof. Caral Dcunha    | Clovette Murzello<br>Mitesh Duraphe |
| 5      | 11-Jul-2020 | TA in Godrej Industries                 | Ms. Priny Thomas      | Prof. Caral Dcunha    | All present                         |
| 6      | 19-Jul-2020 | Talent Aquisition Workshop              | Mr. Frederick Correa  | Prof. Caral Dcunha    | Ankia Kedia (attended first half)   |
|        | 25-Jul-2020 |   |                       |                       | Akanksha Kumawat                    |
| 7      | 26-Jul-2020 | HR Knowledge Bytes                      | Pannel Discussion     | Prof. Caral Dcunha    | Akanksha Kumawat                    |
| 8      | 30-Aug-2020 | HR Knowledge Bytes                      | Ms. Krishna Desai     | Prof. Caral Dcunha    | Roll Nos.: 3,6,9,11,15,18,20        |
| 9      | 01-Sep-2020 |   |                       |                       | Clovette Murzello                   |
|        | 4-Sep-2020  | NLP Workshop                            | Ms. Kiran Padhi       | Prof. Caral Dcunha    | All present                         |
|        | 5-Sep-2020  |   |                       |                       | All present                         |
| 10     | 12-Sep-2020 | Balanced Scorecard                      | Ms. Sanjivani Patil   | Prof. Caral Dcunha    | All present                         |
| 11     | 26-Sep-2020 | Devising L&D Strategies                 | Mr. Sanjay Chandel    | Prof. Caral Dcunha    | Anajana Tiwari                      |
| 12     | 26-Sep-2020 | healthcare industry during COVID 19     | Mr. Neil Sequeira     | Prof. Caral Dcunha    | Anajana Tiwari                      |
| 13     | 24-Oct-2020 | Talent Acquisition and Talent Mangement | Mr. Vishal Sawant     | Prof. Caral Dcunha    | Roll Nos.: 8,9,13,16,19             |
| 14     | 7-Feb-2021  | Executive Coaching                      | Mr. Mudit Yadav       | Prof. Caral Dcunha    | Roll Nos.: 1, 3, 13, 20             |

| Timestamp          | Name              | Was the session useful? | Was the content delivered clear? | Did the session cover what you were expecting? | Overall rating for the session | Any other feedback/suggestion   |
|--------------------|-------------------|-------------------------|----------------------------------|--|--------------------------------|---|
| 9-12-2020 17:11:28 | Aashika Newar     | No                      | No                               | No   |                                | 2 Unclear stimulations  |
| 9-12-2020 17:19:12 | Mitesh            | Yes                     | Yes                              | Yes  |                                | 4 NA  |
| 9-12-2020 20:57:10 | Ankita Kedia      | Yes                     | Yes                              | Yes  |                                | 4 Clearly understood goal setting                                       |
| 9-13-2020 8:44:47  | Ishita Vasudeva   | Yes                     | Yes                              | Yes  |                                | 3 NA  |
| 9-13-2020 9:34:47  | Ayushi Agrawal    | No                      | Yes                              | No   |                                | 2 Could not relate most of the content delivered to the actual topic of |
| 9-13-2020 11:09:26 | Clovette Murzello | No                      | No                               | No   |                                | 1 NA  |





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**Institute of Management Studies and Research**  
(A School of Excellence of N. L. Dalmia Educational Society)

**Following Students Attended NLP Foundation Course Program A.Y 2020-21**

| Sr. No. | Specialisation | Name of the Candidate      | Student enrollment number |
|---------|----------------|----------------------------|---------------------------|
| 1       | HR             | Akanksha Hanumanprasad Kum | PH1921-E02                |
| 2       | HR             | Anjana Pravim Tiwari       | PH1921-E17                |
| 3       | HR             | Ankita Deepak Kedia        | PH1921-E11                |
| 4       | HR             | Ayushi Vinod Agrawal       | PH1921-E15                |
| 5       | HR             | Clovette Clyde Murzello    | PH1921-E03                |
| 6       | HR             | Farhan Mohammed Shaikh     | PH1921-E16                |
| 7       | HR             | Ishita Sunil Vasudeva      | PH1921-E06                |
| 8       | HR             | Meghavi Parag Solanki      | PH1921-E01                |
| 9       | HR             | Mitesh Shamkant Duraphe    | PH1921-E07                |
| 10      | HR             | Palvi Lalitkumar Edake     | PH1921-E14                |
| 11      | HR             | Prajakta Anil Jha          | PH1921-E04                |
| 12      | HR             | Pranjal Yuvraj Mundhe      | PH1921-E20                |
| 13      | HR             | Radhika Ravindra Natu      | PH1921-E10                |
| 14      | HR             | Resham Piyush Thakkar      | PH1921-E08                |

Head of Accreditation

Prof. Dr. Vaishali Kulkarni





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**A.Y. 2020-21**  
**HR Analytics Training**

## HR Analytics Training Outline

| Sr. No | Topic   |
|--------|---|
| 1      | <b>Introduction</b><br>HR Analytics, Business Analytics and linkage to People strategy  |
| 2      | <b>Practical approach to HRIS and Data</b><br>Foundation to HR Analytics tool, explored through demo logins in workshop mode  |
| 3      | <b>Language of Metrics &amp; Analytics</b><br>Descriptive, Prescriptive, Causal, Predictive modelling   |
| 4      | <b>Analysis strategies</b><br>Statistical tests: Factor analysis and Reliability analysis, Exposure to Analytics / statistical tools through SPSS and overview of SAS |
| 5      | <b>Analytics in employee lifecycle</b><br>Recruitment and selection, employee performance, employee engagement, predicting employee turnover,                         |

- 1 - Training outline
- 2 - Some feedback inputs  
Morning
- 3 - Practice session
- 4 - feedback session with

## **HR Analytics Training Feedback and Suggestion**

1. The overall average has been around 4.5 on scale of 5 for all the sessions (some sessions it was 5 on scale of 5 and some in the range of 4-4.5 on scale of 5)
2. The participation and enthusiasm was high and i was particularly impressed with the questions and depth of the analysis of some of the students.
3. Darshika (Associate Director- HR from J&J), supported me in some of these sessions to give a real time live experience to the students.
4. The excel sheet above has verbatim received from students session wise for your records and information

A few suggestions and you may consider it for semester 2 and 4, especially from a placement and deep insights perspective are as below:

1. Modelling in Comp and Ben especially around Flexi.comp, LTI and ESOP's for both traditional companies and startups (an extremely niche skills)
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We will be very happy to help you out and feel free to reach us out at any point of time for any support that you may need.

Regards

**Dr. Srinivas Chunduru**

Founder- VANS Group

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Chief Advisor - Crowdera | Board Advisor - Snackamor | Advisor - Mindful e-commerce | Ex-Senior Advisor - OLA | Member of Board - AF Capital | Partner - Successroute and Ynos (IIT Chennai Incubated) | Advisor - Happiness Consulting | Advisor - Ozone Education consultants.

## Dr. Srinivas Chunduru.

Dr. Srinivas an executive entrepreneur is a business leader with over two decades of experience across diverse functions such as P&L Management, Business development, Corporate Strategy, M&A, Investor Relations and Strategic HR

He is founder and Member of Board of Vans Group (Vans Investments, Vans Skilling and advisory), Vans has its interests in varied areas such as Edutech, Fintech, Skilling & advisory and HR analytics.

VANS Skilling & Advisory , a boutique firm that focusses on helping companies scale.

VANS Skilling partners with organizations in its journey through its unique "Interim model" and co-owns the outcome through rigor in execution. It has served clients in FMCG, Housing Finance, Logistics, Chemicals, consumer electrical, manufacturing, tech and New age internet companies over the last few years. VANS through this model has played a pivotal role as "Interim" (CHRO, CFO, CEO) for its clients. VANS is supported by its state of the art research and knowledge centre in Mumbai.

Vans Skilling through its proprietary products and methodology offers an Integrated approach for achieving business goals and enhancing shareholder Value

Vans Investments, prop fund, which focuses on investments in pre IPO, new age internet consumer and fintech companies.

Srini brings in extensive experience in managing large teams and partnering closely with founders/ promoters/ family managed businesses.

Dr. Srinivas (Srini) was one of Ola's key advisors and is on the board of Ola group companies. He is also on the board of AF Capital (Avail) an innovative digital Financial services company.

Srini till April 2018, was Executive Director at Piramal Housing Finance . At the Piramal group over a decade, he played key roles such as President -Strategy, group CHRO, E.D- Shriram Housing, and as V.P- M&A & IR (PGL).

Srini has experience in diverse industries such as Housing finance, Education, Fintech, real estate, Glass packaging, Mobility, EV, food, Pharma and Engineering.

Srini is recipient of several awards to name a few CLO of the year (TISS, Leap Vault),



**Gold award for Best Simulation for finance ( CLO conference), CHRO of the year (TOI)**

**In 2019, he has been conferred distinguished alumni award at the silver Jubilee of one of India's top rated B schools. In 2020, he has been conferred the prestigious Doctorate in excellence (UCT, Delaware; USA) for his contribution to the area of management**

**HR Analytics: N L Dalmia Institute of Management & Research Studies**

|                        | Learnings   | Did you find the sessions useful? If Yes Why? If No Why?   | Session Rating            | Overall Rating |
|------------------------|---|--|---------------------------|----------------|
| Session 01<br>26-08-20 | HR Analytics is the process of collecting the relevant idea, putting it all together to get some useful information which will help us to make vital conclusions or                               | Yes, I find the session useful, it will surely help me in my future HR journey to work better in the environment where people see HR as Traditional function.  | We did not ask for Rating | 4.45           |
|                        | After this session, I can say HR Analytics is a process of interpreting the data and using it for critical decision. It also helps to popularise the HR efficiency. It can                        | Definitely good, subject looks interesting considering my graduation background and also your approach to teach is interesting.  |                           |                |
|                        | Analytics is collecting and sorting data, spotting a pattern from it, and applying it to make decisions. It is to measure the work of HR with data and number and quantify                        | Very insightful session. HR Analytics is a new topic for me and I was able to understand since the basics are been laid down first.  |                           |                |
| Session 02<br>02-09-20 | I understood how can we quantify training results & apply in various fields. as well as how important it is for hr to link with business and to connect with the bottom lines of an organization. | The session was very useful as it help me understand certain financial concepts that I wasn't aware of along with understanding how HR helps in finding out if a particular function is successful. In today's example we understood how to evaluate the training function on various parameters | We did not ask for Rating |                |
|                        | How exactly can HR Analytics be used to document the measure of effectiveness of HR function in an org. Concepts of ROCE & ROE and how HR improving these   | Yes, the session gave me new insights on how business is connected to HR in different ways as well as and when data could be collected to support the HR function of training. Great takeaways   |                           |                |
|                        | Connect everything you do in HR to how it will help the business, What parameters should be studied to evaluate the effectiveness of a training program. Also, the                                | yes, it was useful to develop eyes and ears to understand the business and linkage of hr in every sphere of business, there is a strategic partnership.  |                           |                |
| Session 03<br>09-09-20 | Realized that HR has a wider range of roles and responsibilities and the contribution we can practically make in improving ROE  | I'll be more equipped in dealing with various business problems not only through the eyes of an HR for HR functions but also HR as a supporting functions which can powerfully impact other business functions and bring value to the table  | We did not ask for Rating |                |
|                        | The role of HR in cost optimization for business by providing actions and services and introducing cultural change in the organization  | Be soft in nature but also prepare yourself for taking harsh decisions, a better implementation of the insights in practical world   |                           |                |
|                        | Approach to culture change should be structured and steady keeping in mind the bringing down cost as a primary objective.   | I liked how we were made to realize that the smallest HR practice is linked or can impact on what a business does, and that HR does contribute more than what's tangible   |                           |                |
| Session 04<br>19-09-20 | Beginning concepts about analytics (importance, why now, types of data analytics), how the cultural aspect, soft predictive analytics & confidentiality helps for better                          | I especially enjoyed the personal stories and examples shared by both ma'am and sir as it gave a very practical insight on how things are actually working in corporates.  | 4.08                      |                |
|                        | The different employee data that are available, understood that data is not always  | The real time examples shared to help us understand the importance of analytics  |                           |                |
|                        | Why data analytics is important and how to it can make an impact on the overall   | The structured way of the programme and the major focus on discussion of the answers given.  |                           |                |
| Session 05<br>26-09-20 | How the metrics and data can be divided into direct and indirect data, we all missed the direct data which was right in front of us   | The excel tip towards the end was very nice, the best thing from the session for me was the detailed feedback we received.   | 4.04                      |                |
|                        | Data is for Business Implication and for People Implication. Apart from the direct & derived data one also needs to see which function will be interested in what data                            | The way we discussed on the real life examples of Indian & Foreign national concerns & impacts to be looked into and the discussion on Diversity & Inclusion   |                           |                |
|                        | clearly insight on how to use data, and that it cannot be the only factor in making decisions   | The discussion on usage of data which has not become obsolete and that we should look at new dimensions for certain predefined metrics   |                           |                |
| Session 06<br>03-10-20 | more logical understanding of importance of data analytics now, types of data analytics and usage of each type in day-to-day operations   | The examples given with reference to real life situations faced by Sir, It made understanding the concept very easy  | 4.4                       |                |
|                        | Types of data analytics, how to use data and implication of data  | Real life examples helped in understanding better what was being communicated  |                           |                |
|                        | Combine two or more data point to make decisions. data can be derived directly or indirectly  | The discussion on usage of data which has not become obsolete and that we should look at new dimensions for certain predefined metrics   |                           |                |
| Session 07<br>10-10-20 | The functionality of corporate world is majorly driven by what you contribute in Interview facing tips- Be genuine and too much enthusiasm is a charm killer                                      | The idea to be flexible with preference of the job roles and industries  | 4.64                      |                |
|                        | All the information was supplemented with no. of examples & was very candid   | Importance of genuinity and if extravagance needed- Extent of it   |                           |                |
|                        |   | Some great interview tips & clarity on corporate working   |                           |                |
| Session 08<br>17-10-20 | The importance of leveraging the data as per your system requirements and the effective use of all the recruitment metrics to draw inference about the process                                    | Data pruning is important at all stages to make a use out of it. To make data sensible for the end user avoid over abundance of data if no inference can be drawn from it  | 4.09                      |                |
|                        | better understanding of the recruitment and selection process, what data is useful  | practical, relevant and easy to understand examples to understand the discussion   |                           |                |
|                        | The usefulness of data completely depends on the situation. Data needs to be  | The examples helped me understand how vital it is to understand every aspect of data analysis  |                           |                |
| Session 09<br>24-10-20 | What should be the weightage of each steps/aspects of PMS & how does it happen in the organizations, proper buy in from all employees/managers, collecting data on                                | The example stated today gave a better understanding of how change was implemented within the performance management system  | 5                         |                |
|                        | The vital part of a Performance Management System should be focused on Planning and assessing objectives & to draw sequential inferences from available   | PMS changes brought at Piramal gave an exemplary model of how to go about not just superficially but right from the grass-root level & then using data at each step to make the process better   |                           |                |
|                        | 1) Data is useless unless you use it for building a sequence and making a strategy.<br>2) PMS is not just about Appraisal and Development. Planning and Monitoring are                            | The case study of Piramal gave a very practical understanding of how data can be interpreted and used in a real life scenario.   |                           |                |

## **HR Analytics Training Feedback and Suggestion**

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Regards

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**Following Students Attended HR Analytics Training Program A.Y 2020-21**

| Sr. No. | Specialisation | Name of the Candidate    | Student enrollment number |
|---------|----------------|--------------------------|---------------------------|
| 1       | HR             | Clovette Clyde Murzello  | PH1921-E03                |
| 2       | HR             | Farhan Mohammed Shaikh   | PH1921-E16                |
| 3       | HR             | Ishita Sunil Vasudeva    | PH1921-E06                |
| 4       | HR             | Meghavi Parag Solanki    | PH1921-E01                |
| 5       | HR             | Mitesh Shamkant Duraphe  | PH1921-E07                |
| 6       | HR             | Palvi Lalitkumar Edake   | PH1921-E14                |
| 7       | HR             | Prajakta Anil Jha        | PH1921-E04                |
| 8       | HR             | Pranjal Yuvraj Mundhe    | PH1921-E20                |
| 9       | HR             | Radhika Ravindra Natu    | PH1921-E10                |
| 10      | HR             | Resham Piyush Thakkar    | PH1921-E08                |
| 11      | HR             | Rhea Anand Hajare        | PH1921-E12                |
| 12      | HR             | Sakshi Sanjay Tiwari     | PH1921-E13                |
| 13      | HR             | Shikha Brijbhushan Singh | PH1921-E09                |
| 14      | HR             | Shrutika Somnath Taware  | PH1921-E18                |

Head of Accreditation

Prof. Dr. Vaishali Kulkarni





# **N. L. Dalmia<sup>®</sup>** **Institute of Management Studies and Research**

*(A School of Excellence of N. L. Dalmia Educational Society)*

**A.Y. 2020-21**  
**EDX**





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**Institute of Management Studies and Research**  
*(A School of Excellence of N. L. Dalmia Educational Society)*

| Sr.No. | Name of the Student | A.Y.    | Certificate | Name of the Course/ Event                           | Company/University |
|--------|---------------------|---------|-------------|---|--------------------|
| 1      | Shreya Jog          | 2020-21 | Course      | BMI.1x:The Value of Business Models                 | edx                |
| 2      | Shreya Jog          | 2020-21 | Course      | ENES662x:Identifying Entrepreneurial Opportunities  | edx                |
| 3      | Shreya Jog          | 2020-21 | Course      | BMI.3x:Business Model Testing                       | edx                |
| 4      | Paras Tank          | 2020-21 | Course      | PY01010EN: Python Basics for Data Science           | edx                |
| 5      | Prasad Gharat       | 2020-21 | Course      | BD1x:Big Data Strategies to Transform your Business | edx                |
| 6      | Prasad Gharat       | 2020-21 | Course      | BNET001:Preparing to Network in English             | edx                |
| 7      | Prasad Gharat       | 2020-21 | Course      | GSE2x:Leaders of Learning                           | edx                |
| 8      | Ronak Shah          | 2020-21 | Course      | TW3421x:An Introduction to Credit Risk Management   | edx                |
| 9      | Ronak Shah          | 2020-21 | Course      | BMI.3x:Business Model Testing                       | edx                |
| 10     | Ronak Shah          | 2020-21 | Course      | BMI.1x:The Value of Business Models                 | edx                |
| 11     | Ronak Shah          | 2020-21 | Course      | PY01010EN: Python Basics for Data Science           | edx                |
| 12     | Arti Jani           | 2020-21 | Course      | BD1x:Big Data Strategies to Transform your Business | edx                |
| 13     | Arti Jani           | 2020-21 | Course      | ENCE665.2:Let's Get Started:Building Self-Awareness | edx                |
| 14     | Arti Jani           | 2020-21 | Course      | GSE2x:Leaders of Learning                           | edx                |
| 15     | Javed Shaikh        | 2020-21 | Course      | PY01010EN: Python Basics for Data Science           | edx                |

**edX Online Campus Proposal for NL Dalmia**

10 messages

**Amit Goyal** <agoyal@edx.org>  
To: aman.tibrewal@nldalmia.in

19 October 2020 at 12:50

Dear Aman,

As discussed over the weekend, please find attached edX Online Campus proposal for NL Dalmia.

A quick summary:- edX is the world's leading E-learning platform founded by MIT & Harvard University. Our courses are designed by 155+ top ranking institutes of the world e.g. MIT, Harvard, Columbia, IBM, AWS etc.

**edX Proposition for Campuses:**

a) Bulk Purchase of Course Specific Enrolment Codes - Our full catalog has ~2200 active courses. The price for each course certificate ranges from \$50 to \$500 with an average price range of \$100. You can identify the course/s of interest, define the number of codes you'd like to buy for each course, and make the bulk purchase from edX. Think of this as an A'la carte menu - where you pay for what you intend to consume. The minimum amount of bulk purchase is \$10,000 and discounts of 10% are applicable with an up-front purchase of \$50,000 worth of code purchase.

b) Online Campus Subscription - We just started this subscription model considering the higher consumption and flat pricing need of campuses. We've curated a catalog of **~530 courses** from the master catalog and campus can buy student-specific licenses to consume unlimited certifications from this catalog. i.e. pay a flat fee per user and let them take as many certifications as they want. The commercials are \$200/student/year when you buy 500 & more licenses; and \$250/student/year when you buy 150-500 licenses. This model is highly recommended for your campus.

I've attached a proposal for Online Campus subscription model for you. Also included, a video case study of IIT Bombay; catalog (include Full Catalog (a) and Online Campus Catalog (b) mentioned above); and sample certificate for your reference.

Refer slide 20 of the proposal for the commercials. Let me know if you have any questions.

Regards,  
Amit

(Amit Goyal)  
Head India & S.E. Asia  
edX (by MIT & Harvard)  
New Delhi | +91 9711534418  
agoyal@edx.org

**3 attachments**

iit-bombay-case-study-video-final-1\_sfg5s106.mp4  
5428K

edX Full Catalog 14October2020.xlsx  
952K

edX Proposal NL Dalmia\_slide20commercials\_19Oct20.pdf  
1972K

**Aman Tibrewal** <aman.tibrewal@nldalmia.in>  
To: tapas.mitra@nldalmia.edu.in  
Cc: Vikram Somani <vikram.somani@nldalmia.in>

20 October 2020 at 10:52

Respected Sir,

Hope this email finds you well. Please find attached in the trail mail proposal from edX for comparative analysis against Coursera. Do let me know if you have any queries or additional information required.

Thanks & Regards,



Please consider the environment before printing this email  
[Quoted text hidden]

**Aman Tibrewal** | Team Marketing  
**N. L. Dalmia Institute of Management Studies and Research**  
(A School of Excellence of N. L. Dalmia Educational Society)  
M: +91-96192 33409 | B: (022) 4299 0033 (Ext. 780)  
Srishti, Sector 1, Mira Road (E), Thane (MMR) 401107

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### 3 attachments

- iit-bombay-case-study-video-final-1\_sfg5s1O6.mp4  
5428K
- edX Full Catalog 14October2020.xlsx  
952K
- edX Proposal NL Dalmia\_slide20commercials\_19Oct20.pdf  
1972K

Tapas Mitra <tapas.mitra@nldalmia.edu.in>  
To: Aman Tibrewal <aman.tibrewal@nldalmia.in>  
Cc: Vikram Somani <vikram.somani@nldalmia.in>

21 October 2020 at 11:47

Thanks Aman. I will revert.

Cheers,



Please reflect on your environmental responsibility. Before printing this e-mail message, ask yourself whether you really need a hard copy.

**Tapas Mitra** |  
Associate Professor - Finance  
**N. L. Dalmia Institute of Management Studies and Research**  
(A School of Excellence of N. L. Dalmia Educational Society)  
M: +91-96500 07779 | B: (022) 4299 0033

| F: +91 22 4299 0088  
V:  
<https://us02web.zoom.us/j/5503423232>  
Srishti, Sector 1, Mira Road (E), Thane (MMR) 401107

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**From:** Aman Tibrewal <aman.tibrewal@nldalmia.in>  
**Sent:** Tuesday, October 20, 2020 10:52 AM  
**To:** Tapas Mitra <tapas.mitra@nldalmia.edu.in>  
**Cc:** Vikram Somani <vikram.somani@nldalmia.in>  
**Subject:** Fwd: edX Online Campus Proposal for NL Dalmia

[Quoted text hidden]

22 October 2020 at 14:57

Tapas Mitra <tapas.mitra@nldalmia.edu.in>  
To: Aman Tibrewal <aman.tibrewal@nldalmia.in>  
Cc: Vikram Somani <vikram.somani@nldalmia.in>

Dear Aman,

Having gone through the documents shared by you, I tend to think the following way.

- edX seems to be a fierce competitor to Coursera; however, I am not sure as to how much it has Indian-ised their activities. We need to have a meeting with edX in order to have a clearer idea and have some clarity provided.
- As we are aware, that Coursera has shown interest in holding our hands to develop the required curriculum for the students, we need to understand the edX perspective on this aspect.
- On the overall, both may be able to meet our needs (soft skills, attitude, risk taking mentality, financial modeling, resume writing, communication - writing and speaking, etc.) as well as some very good courses that would prepare students to practices of the topics, in the international area.
- edX is established and supported by internationally acclaimed top-notch universities and partnered by many others, whereas, Coursera is established and supported by renowned individuals and not universities, apart from being partnered by many. However, it seems to have prepared better for India.
- In India, edX has been partnered with IIT - Mumbai and IIM - B whereas, Coursera partners institutes and universities of the next notch.
- edX is pricing at USD, is Coursera also doing the same?

Apart from the above, I had requested Vikram, to find out as to what other IIMs and SPJIMR have done in this regard.

We need to prepare a comparative chart between both - Coursera and edX based on different parameters including pricing. This information will help in arriving at a decision.

Cheers,



**Tapas Mitra |**

Associate Professor - Finance

**N. L. Dalmia Institute of Management Studies and Research**

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| F: +91 22 4299 0088

V:

<https://us02web.zoom.us/j/5503423232>

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Please reflect on your environmental responsibility. Before printing this e-mail message, ask yourself whether you really need a hard copy.

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**From:** Tapas Mitra <tapas.mitra@nldalmia.edu.in>  
**Sent:** Wednesday, October 21, 2020 11:47 AM  
**To:** Aman Tibrewal <aman.tibrewal@nldalmia.in>  
**Cc:** Vikram Somani <vikram.somani@nldalmia.in>  
**Subject:** Re: edX Online Campus Proposal for NL Dalmia

[Quoted text hidden]

28 October 2020 at 11:29

Aman Tibrewal <aman.tibrewal@nldalmia.in>  
To: Amit Goyal <agoyal@edx.org>

Hi Amit,

Thankyou for sharing the proposal with us. Our faculty team is keen to understand more in depth about edX and the various courses it has to offer. I request you to arrange for a presentation/meeting for the same.

Thanks & Regards,



Please consider the environment before printing this email

[Quoted text hidden]

**Aman Tibrewal** | Team Marketing  
**N. L. Dalmia Institute of Management Studies and Research**  
(A School of Excellence of N. L. Dalmia Educational Society)  
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28 October 2020 at 13:34

**Amit Goyal** <agoyal@edx.org>  
To: Aman Tibrewal <aman.tibrewal@nldalmia.in>, Rishabh Jain <rjain@edx.org>

Hi Rishabh - Please connect with Aman and deliver a preliminary presentation.

Thanks,  
Amit  
[Quoted text hidden]

--  
[Quoted text hidden]

28 October 2020 at 14:23

**Rishabh Jain** <rjain@edx.org>  
To: Amit Goyal <agoyal@edx.org>  
Cc: Aman Tibrewal <aman.tibrewal@nldalmia.in>

Hi Amit,

Thank you for your email.

Hi Aman, Nice to e-meet you. Please let me know your convenient time to schedule a call.

I look forward to hearing from you.

Best,  
Rishabh

[Quoted text hidden]

6 November 2020 at 14:58

**Aman Tibrewal** <aman.tibrewal@nldalmia.in>  
To: Rishabh Jain <rjain@edx.org>  
Cc: Amit Goyal <agoyal@edx.org>, Vikram Somani <vikram.somani@nldalmia.in>

Hi Rishabh,

Happy to e-meet you.

I apologize for the delay as we were occupied with online events. I just wanted to see if a session can be organized sometime next week with the faculties so that they can understand what edX has to offer for students. I will reach out to you on Monday with faculty availability to ensure that all faculties are present. Please do share your contact details so that I can reach out to you in case I have any queries.

I look forward to hearing from you.

Thanks & Regards,

**Aman Tibrewal** | Team Marketing  
**N. L. Dalmia Institute of Management Studies and Research**  
(A School of Excellence of N. L. Dalmia Educational Society)  
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**Rishabh Jain** <rjain@edx.org>  
To: Aman Tibrewal <aman.tibrewal@nldalmia.in>

6 November 2020 at 19:22

Hi Aman,

Thank you for your email. I am available at +918454854112.

Thanks,  
Rishabh

[Quoted text hidden]

---

**Rishabh Jain** <rjain@edx.org>  
To: Aman Tibrewal <aman.tibrewal@nldalmia.in>

15 January 2021 at 11:17

<https://campus.edx.org/customers/essentials-catalog#browse>  
[Quoted text hidden]

Invitation: edX Online Campus for NL Dalmia @ Thu 3 Dec 2020 12:15pm - 1:15pm (IST) (aman.tibrewal@nldalmia.in)

3 messages

rjain@edx.org <rjain@edx.org>  
Reply-To: rjain@edx.org  
To: aman.tibrewal@nldalmia.in

3 December 2020 at 11:58

You have been invited to the following event.

edX Online Campus for NL Dalmia

When Thu 3 Dec 2020 12:15pm – 1:15pm India Standard Time - Kolkata [more details »](#)

Joining info Join with Google Meet  
meet.google.com/pek-zcda-ayj

Join by phone  
(US) +1 502-414-3948 (PIN: 241114495)

More phone numbers

Calendar aman.tibrewal@nldalmia.in

Who • rjain@edx.org- organiser  
• aman.tibrewal@nldalmia.in

Going (aman.tibrewal@nldalmia.in)? **Yes - Maybe - No** [more options »](#)

Invitation from Google Calendar

You are receiving this email at the account aman.tibrewal@nldalmia.in because you are subscribed for invitations on calendar aman.tibrewal@nldalmia.in.

To stop receiving these emails, please log in to <https://calendar.google.com/calendar/> and change your notification settings for this calendar.

Forwarding this invitation could allow any recipient to send a response to the organiser and be added to the guest list, invite others regardless of their own invitation status or to modify your RSVP. [Learn more.](#)

 [invite.ics](#)  
2K

Aman Tibrewal <aman.tibrewal@nldalmia.in>

3 December 2020 at 12:01

To: Vikram Somani <vikram.somani@nldalmia.in>, tapas.mitra@nldalmia.edu.in

Thanks & Regards,



N. L. Dalmia®



**Aman Tibrewal** | Team Marketing  
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[Quoted text hidden]

 **invite.ics**  
2K

**Aman Tibrewal** <aman.tibrewal@nldalmia.in>  
To: Khushboo Vora <khushboo.vora@nldalmia.in>

3 December 2020 at 12:17

Thanks & Regards,



**Aman Tibrewal** | Team Marketing  
**N. L. Dalmia Institute of Management Studies and Research**  
(A School of Excellence of N. L. Dalmia Educational Society)  
M: +91-96192 33409 | B: (022) 4299 0033 (Ext. 780)  
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----- Forwarded message -----

From: <rjain@edx.org>  
Date: Thu, 3 Dec 2020 at 11:58  
Subject: Invitation: edX Online Campus for NL Dalmia @ Thu 3 Dec 2020 12:15pm - 1:15pm (IST)  
(aman.tibrewal@nldalmia.in)  
To: <aman.tibrewal@nldalmia.in>

[Quoted text hidden]

 **invite.ics**  
2K

**Re: Accepted: edX Online Campus for NL Dalmia @ Thu Dec 3, 2020 12:15pm - 1:15pm (IST) (rjain@edx.org)**

1 message

Rishabh Jain <rjain@edx.org>  
To: Aman Tibrewal <aman.tibrewal@nldalmia.in>

3 December 2020 at 13:29

Hi Aman,

Please do the registration on <https://campus.edx.org/essentials> for free courses.

Best,  
Rishabh

On Thu, Dec 3, 2020 at 12:07 PM <aman.tibrewal@nldalmia.in> wrote:

**aman.tibrewal@nldalmia.in has accepted this invitation.**

**edX Online Campus for NL Dalmia**

When Thu Dec 3, 2020 12:15pm – 1:15pm India Standard Time - Kolkata

Joining info Join with Google Meet  
[meet.google.com/pek-zcda-ayj](https://meet.google.com/pek-zcda-ayj)

Join by phone  
(US) +1 502-414-3948 (PIN: 241114495)

More phone numbers

Calendar [rjain@edx.org](mailto:rjain@edx.org)

Who

- [rjain@edx.org](mailto:rjain@edx.org) - organizer
- [aman.tibrewal@nldalmia.in](mailto:aman.tibrewal@nldalmia.in)
- Tapas Mitra

Invitation from Google Calendar

You are receiving this email at the account [rjain@edx.org](mailto:rjain@edx.org) because you are subscribed for invitation replies on calendar [rjain@edx.org](mailto:rjain@edx.org).

To stop receiving these emails, please log in to <https://calendar.google.com/calendar/> and change your notification settings for this calendar.

Forwarding this invitation could allow any recipient to send a response to the organizer and be added to the guest list, or invite others regardless of their own invitation status, or to modify your RSVP. [Learn More.](#)

| edX Inc. Enterprise Subscription Order Form |  |                      |  |
|---|--|----------------------|--|
| Company Name (Customer)                     | N.L. Dalmia Institute of Management Studies & Research | Order Effective Date | 12/04/2020                                 |
| Customer Contact Name                       | Aman Tibrewal  | Customer Address     |  |
| Customer Contact Email                      | aman.tibrewal@nldalmia.in                              | Street 1             | Srishti Rd, Sector 1, Mahajan Wadi, Mira R |
|   |  | Street 2             | ra Bhayandar, Maharashtra                  |
|   |  | City                 | Mumbai                                     |
|   |  | State                | Maharashtra                                |
|   |  | Country              | India                                      |
|   |  | Zip                  | 401107                                     |

**Products:**

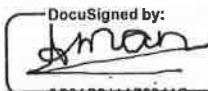
1. **Course enrollments** via the edX Learner Portal that cover the cost per seat in the verified certificate track ("Subscription Licenses") in certain massive open online courses offered at [www.edx.org](http://www.edx.org) ("Subscription Catalog Courses"), as set forth in the order details in the attached **Schedule 1**.
2. **Data package** of certain demographic, enrollment and completion data ("Data") subject to terms set forth in the attached **Schedule 2** and available only relative to Subscription Licenses purchased for internal use by Customer's faculty, staff and students (each, an "Enterprise Learner" or "Licensed User").
3. **Learner support**: processing by edX's learner support team of learner support tickets in English for Subscription Catalog Courses.

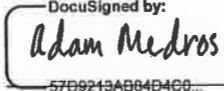
| Check all that apply:                                     | Products  | Fees (in USD)                           |
|---|---|---|
| X   | Course enrollments  | <b>Prepaid Subscription Fee: WAIVED</b> |
| X   | Data package – see attached <b>Schedule 2</b> for details | <b>Enterprise Services Fee: WAIVED</b>  |
| X   | Learner support   |   |
| Total amount to be invoiced upon signature: \$ 0.00 (USD) |   |   |

Customer hereby orders from edX the Products checked above as described in this order form ("Order Form"). This Order Form is issued under and incorporates the terms and conditions set forth in the edX Enterprise Sales Terms and Conditions located at [https://www.edx.org/assets/enterprise\\_sales\\_terms\\_and\\_conditions.pdf](https://www.edx.org/assets/enterprise_sales_terms_and_conditions.pdf). Customer acknowledges and agrees that edX reserves the right in its sole discretion to void this Order Form if Customer is not eligible for edX's Online Campus Essentials offering or in the event of Customer's misuse of the Products. Each person signing this form hereby represents and warrants that he or she has full authority to execute this Order Form for the party on whose behalf he or she is signing.

Customer: N. L. Dalmia Institute of Management Studies & Research

edX Inc.

By (Signature):   
DocuSigned by:  
3C81C241A72341C...  
 Name: Aman Tibrewal  
 Title: Marketing Exc  
 Date: 2020-12-06

By (Signature):   
DocuSigned by:  
57D9243AB84D4C0...  
 Name: Adam Medros  
 Title: Co-CEO  
 Date: 2020-12-07



**Schedule 1 - Order Details**

**1. Number of Enterprise Learners (Licensed Users): up to 500**

- Customer is responsible for assigning and managing Subscription License access to Enterprise Learners via the edX Admin Dashboard. Customer agrees that Subscription Licenses shall be individually attributable and, by policy, not shared or assumed by any other user. Except only as may be specifically permitted by edX in the event of an Enterprise Learner's departure with respect to a maximum of five percent (5%) of the number of Licensed Users under this Order Form, Customer further agrees that Subscription Licenses are non transferable and shall not be reassigned. edX reserves the right to suspend access for violation of such access rights and responsibilities.
- For purposes of clarity, each Enterprise Learner shall have unlimited access during the Subscription Period (as defined in #2 below) to discover and enroll in Subscription Catalog Courses included in the course catalog specified in #3 below.

**2. Subscription Licenses shall expire on July 31, 2021.**

- For purposes of clarity, Enterprise Learners will be eligible to enroll in the verified certificate track of the courses included in the catalog specified in #3 below until and including July 31, 2021 (for clarity, until 11:59 PM UTC) (the "Subscription Period"), upon which time this Order Form shall expire.
- Upon expiration of this Order Form and the end of the Subscription Period: (i) Enterprise Learners will retain access to their edX.org user accounts and any verified certificates of achievement earned during the Subscription Period; and (ii) with respect to any in-progress courses, Enterprise Learners will be automatically transitioned to enrollment in the audit track of such courses.
- Customer and edX acknowledge and agree that this Order Form supports a single order for the Subscription Period. Customer and edX may reach mutually agreeable terms regarding future subscription purchases, and with respect to such purchase(s), shall complete and execute a new standard edX Inc. Enterprise Subscription Order Form, which shall include the applicable subscription order details.

**3. This Order Form will cover the following edX-curated catalog of courses offered at [www.edx.org](http://www.edx.org) and made available during the Subscription Period: **Online Campus Essentials Catalog.****

- Customer acknowledges and agrees that courses offered and made available as part of the above-listed catalog are subject to change from time to time. In the event a course is removed from the above-listed catalog, Enterprise Learners who have previously enrolled in such course may continue to participate in the course and will remain eligible to earn a verified certificate of achievement upon successful course completion for so long as the course remains available on edX.org.

Schedule 2 - Data Terms

Data is subject to the following terms:

1. Frequency: Data will be provided on a daily basis.
2. Format: Data will be provided in the form of CSV reports.
3. Method of delivery: Data will be encrypted for secure delivery via the edX Admin Dashboard.
4. Data elements: Data will include the following elements below per Enterprise Learner (additional data fields related to Course demographics, enrollment and completion may be added by edX from time to time):

| Type        | Data                       | Status | Comment                     |
|-------------|----------------------------|--------|-----------------------------|
| Demographic | Username                   | v1.0   |                             |
| Demographic | Email Address              | v1.0   |                             |
| Demographic | Country                    | v1.0   |                             |
| Demographic | Other                      | v1.0   |                             |
| Demographic | Date of Account Creation   | v1.0   |                             |
| Enrollment  | Enrolled Course(s) Name(s) | v1.0   |                             |
| Enrollment  | CourseID                   | v1.0   |                             |
| Enrollment  | Course Start Date          | v1.0   |                             |
| Enrollment  | Course End Date            | v1.0   | N/A for self-paced courses. |
| Enrollment  | Enrollment Date            | v1.0   |                             |
| Completion  | Final Grade                | v1.0   |                             |

---

**Getting Started with edX Online Campus Essentials**

2 messages

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edX For Business <support@edxforbusiness.zendesk.com>

7 December 2020 at 22:36

Reply-To: edX For Business <support+id1589075@edxforbusiness.zendesk.com>

To: "aman.tibrewal" <aman.tibrewal@nldalmia.in>

##- Please type your reply above this line -##



Mariana (edX For Business)

Dec 7, 2020, 12:06 PM EST

Hello,

Welcome to edX Online Campus Essentials! We're happy to have you on board and we look forward to working with you. Please find herein your Digital Welcome Packet including instructions for getting started with subscriptions.

We'd like to start by offering you access to our Administrator Dashboard, where you will be able to begin assigning subscription licenses to your learners and access your regularly updated learner progress data report.

- Please **click here** to create your edX account and configure your admin account.
- Then you may log into the dashboard at **portal.edx.org** to get started.
- Find a short video on how to navigate the Dashboard here.

Also, please find both a quick start as well as a detailed guide for assigning subscription licenses to your learners and helping them access their courses. This new tool simplifies the most common license management activities such as Assigning license to learners (and sending an automated email), Reminding learners to activate their license and Tracking activations. We are also including materials you can share with learners via your internal LMS or other platforms.

- Admin Resources
  - Admin Quick Start Guide
  - Detailed Guide
  - Online Campus Essentials Course Catalog
  - VIDEO: Using the Admin Dashboard

- Learner Resources

- Learners can use this URL to get to their learner portal after they have activated their subscription license. This is unique to your organization.  
<https://enterprise.edx.org/nldimsr>
- Learner Quick Start Guide
- VIDEO: Using the Learner Dashboard

If you are new to edX, we recommend viewing the welcome video from our CEO Anant Agarwal [here](#). You can also take **DemoX**, a fun and interactive course designed to help you and your learners explore the edX learning experience.

You now have everything you need to get started with Online Campus Essentials from edX!

Best regards,  
The edX Online Campus Essentials Team

Find more answers at the edX Help Center

This email is a service from edX For Business. Delivered by edX.

[VPQXL7-6W7L]

**Aman Tibrewal** <[aman.tibrewal@nldalmia.in](mailto:aman.tibrewal@nldalmia.in)>  
To: Vikram Somani <[vikram.somani@nldalmia.in](mailto:vikram.somani@nldalmia.in)>

12 December 2020 at 12:18

Thanks & Regards,



**Aman Tibrewal** | Team Marketing  
**N. L. Dalmia Institute of Management Studies and Research**

(A School of Excellence of N. L. Dalmia Educational Society)

M: +91-96192 33409 | B: (022) 4299 0033 (Ext. 780)

Srishti, Sector 1, Mira Road (E), Thane (MMR) 401107

Accredited Grade "A" by NAAC & "Premier College" by ASIC

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Please consider the environment before printing this email  
[Quoted text hidden]

edX Online Campus Essentials

6 messages

Aman Tibrewal <aman.tibrewal@nldalmia.in> 15 January 2021 at 12:55
To: Joyeeta Chatterjee <joyeeta.chatterjee@nldalmia.edu.in>, Caral D'Cunha <caral.d Cunha@nldalmia.edu.in>, tarun.agarwal@nldalmia.edu.in
Cc: Vijay Ramchandran <director@nldalmia.edu.in>

Greetings to all HODs,

We are proud to announce that NLDIMSR has enrolled for Online Campus Essentials with edX.

This is a 6-month free membership model that will allow students and faculty to learn from a course catalogue of about 100 courses and obtain certificates from top foreign universities who offer courses on the edX platform. It is similar to the Coursera initiative we offered earlier.

I am listing below a link to the course catalogue made available to us as a part of the agreement.

Link: https://campus.edx.org/customers/essentials-catalog#browse

I request each of you to provide a list of 6 courses each (Finance, Marketing, HR) out of which 3 courses are to be made compulsory for students to complete by July 2021 (Membership Deadline) and submit certificates for the same to the Institute. Apart from the 3 courses, students are free to do as many courses as they want.

Once we have the list with us, we will send out enrollment emails to the students and faculties for the same.

Thanks & Regards,

Aman Tibrewal | Team Marketing
N. L. Dalmia Institute of Management Studies and Research
(A School of Excellence of N. L. Dalmia Educational Society)
M: +91-96192 33409 | B: (022) 4299 0033 (Ext. 780)
Srishti, Sector 1, Mira Road (E), Thane (MMR) 401107

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N. L. Dalmia



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Vijay Ramchandran <director@nldalmia.edu.in> 15 January 2021 at 12:58
To: Aman Tibrewal <aman.tibrewal@nldalmia.in>, Joyeeta Chatterjee <joyeeta.chatterjee@nldalmia.edu.in>, Caral D'Cunha <caral.d Cunha@nldalmia.edu.in>, Tarun Agarwal <tarun.agarwal@nldalmia.edu.in>

This is an important course tool - please make sure you pick relevant courses that students can complete online as part of requirements.

Earlier data shows lots of registrations, but very little actual completion. (Coursera). Unless you make completion mandatory, students wont complete.

Thanks and regards, vijay

Sent from Mail for Windows 10

[Quoted text hidden]

Aman Tibrewal <aman.tibrewal@nldalmia.in> 23 January 2021 at 15:20
To: Vijay Ramchandran <director@nldalmia.edu.in>
Cc: Joyeeta Chatterjee <joyeeta.chatterjee@nldalmia.edu.in>, Caral D'Cunha <caral.d Cunha@nldalmia.edu.in>, Tarun Agarwal <tarun.agarwal@nldalmia.edu.in>

Dear All,

Gentle reminder for the list of courses.

Thanks & Regards,

Aman Tibrewal | Marketing Executive
N. L. Dalmia Institute of Management Studies and Research
(A School of Excellence of N. L. Dalmia Educational Society)
M: +91-9619233409 | M: +91-9930999555 | B: (022) 4299 0033 (Ext. 680)
Sector 1, Srishti, Mira Road (E), Thane (MMR) 401107

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[Quoted text hidden]

Joyeeta Chatterjee <joyeeta.chatterjee@nldalmia.edu.in> 24 January 2021 at 00:34
To: Aman Tibrewal <aman.tibrewal@nldalmia.in>, Vijay Ramchandran <director@nldalmia.edu.in>
Cc: Caral D'Cunha <caral.d Cunha@nldalmia.edu.in>, Tarun Agarwal <tarun.agarwal@nldalmia.edu.in>

Dear Aman,

I recommend the following courses. Every student should take any two.

- 1) Python Basics for Data Science



- 2) Statistical Thinking for Data Science and Analytics
- 3) AI for Everyone: Master the Basics
- 4) Blockchain: Understanding Its Uses and Implications
- 5) How to Design a Successful Business Model
- 6) Marketing Innovative Products and Services
- 7) Leaders of Learning
- 8) Academic Writing Made Easy
- 9) Business Considerations for 5G, IoT and AI

Regards,



**Dr. Joyeeta Chatterjee** | Professor and HoD Marketing  
**N. L. Dalmia Institute of Management Studies and Research**  
(A School of Excellence of N. L. Dalmia Educational Society)  
M: +91-9891688482 | (022) 42990053 Ext. 753 | F: +91 22 4299 0088  
<https://us02web.zoom.us/j/2950298966?pwd=bn1RmdXUSlVRFVmaEd5aDVGeHkwZz09>  
Srishti, Sector 1, Mira Road (E), Thane (MMR) 401107  
Website: <http://nldalmia.edu.in>

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---

**From:** Aman Tibrewal <[aman.tibrewal@nldalmia.in](mailto:aman.tibrewal@nldalmia.in)>  
**Sent:** Saturday, January 23, 2021 15:20  
**To:** Vijay Ramchandran <[director@nldalmia.edu.in](mailto:director@nldalmia.edu.in)>  
**Cc:** Joyeeta Chatterjee <[joyeeta.chatterjee@nldalmia.edu.in](mailto:joyeeta.chatterjee@nldalmia.edu.in)>; Caral D'Cunha <[caral.dcunha@nldalmia.edu.in](mailto:caral.dcunha@nldalmia.edu.in)>; Tarun Agarwal <[tarun.agarwal@nldalmia.edu.in](mailto:tarun.agarwal@nldalmia.edu.in)>  
**Subject:** Re: edX Online Campus Essentials

[Quoted text hidden]

---

**Caral D'Cunha** <[caral.dcunha@nldalmia.edu.in](mailto:caral.dcunha@nldalmia.edu.in)> 27 January 2021 at 17:36  
**To:** Aman Tibrewal <[aman.tibrewal@nldalmia.in](mailto:aman.tibrewal@nldalmia.in)>, Joyeeta Chatterjee <[joyeeta.chatterjee@nldalmia.edu.in](mailto:joyeeta.chatterjee@nldalmia.edu.in)>, Tarun Agarwal <[tarun.agarwal@nldalmia.edu.in](mailto:tarun.agarwal@nldalmia.edu.in)>  
**Cc:** Vijay Ramchandran <[director@nldalmia.edu.in](mailto:director@nldalmia.edu.in)>

Dear Aman,

Pls find below the list of courses HR students can enroll in:

1. Let's Get Started: Building Self-Awareness
2. Statistical Thinking for Data Science and Analytics
3. Preparing to Network in English
4. AI for Everyone: Master the Basics
5. Leaders of Learning
6. Big Data Strategies to Transform Your Business

Thanks and regards,



**Prof. Caral D'Cunha** | Human Resource  
**N. L. Dalmia Institute of Management Studies and Research**  
(A School of Excellence of N. L. Dalmia Educational Society)  
M: +91-9920467801 | D: (022) 4299 0057 | B: (022) 4299 0033 (Ext. 657) | F: +91 22 4299 0088  
Sector 1, Srishti, Mira Road (E), Thane (MMR) 401107

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PG #8

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**From:** Aman Tibrewal <[aman.tibrewal@nldalmia.in](mailto:aman.tibrewal@nldalmia.in)>  
**Sent:** 15 January 2021 12:55  
**To:** Joyeeta Chatterjee <[joyeeta.chatterjee@nldalmia.edu.in](mailto:joyeeta.chatterjee@nldalmia.edu.in)>; Caral D'Cunha <[caral.dcunha@nldalmia.edu.in](mailto:caral.dcunha@nldalmia.edu.in)>; Tarun Agarwal <[tarun.agarwal@nldalmia.edu.in](mailto:tarun.agarwal@nldalmia.edu.in)>  
**Cc:** Vijay Ramchandran <[director@nldalmia.edu.in](mailto:director@nldalmia.edu.in)>  
**Subject:** edX Online Campus Essentials

[Quoted text hidden]

---

**Tarun Agarwal** <[tarun.agarwal@nldalmia.edu.in](mailto:tarun.agarwal@nldalmia.edu.in)>  
**To:** "aman.tibrewal@nldalmia.in" <[aman.tibrewal@nldalmia.in](mailto:aman.tibrewal@nldalmia.in)>

4 February 2021 at 16:19

edX Campus Essentials

1 message

Aman Tibrewal <aman.tibrewal@nldalmia.in>

2 March 2021 at 17:35

To: pg2020-22a@nldalmia.edu.in, pg2020-22b@nldalmia.edu.in, pg2020-22c@nldalmia.edu.in, pg2020-22d@nldalmia.edu.in  
Cc: Vikram Somani <vikram.somani@nldalmia.in>, Reeba Mathew <exam@nldalmia.in>

Greetings students,

We are proud to announce that NLDIMSR has enrolled for **Online Campus Essentials with edX**.

This is a 4.5-month free membership model that will allow students to learn from a course catalogue of about 100 courses and obtain certificates from top foreign universities who offer courses on the edX platform without incurring any cost. It is similar to the Coursera Initiative we offered earlier.

It is compulsory for all students to complete at least 3 of the listed 6 courses as per your specialization and submit the certificates for the same to the exam department by 15<sup>th</sup> July 2021 (please see attached word document for list of recommendations). Apart from the mandatory requirements, we encourage students to pursue as many courses possible as it will serve as a value addition and help during placements.

You all will receive invite emails on your respective institute email IDs in the next 24 hours. Last date to complete all courses is 15 July 2021 with no further extensions.

Thanks & Regards,



N. L. Dalmia

Aman Tibrewal | Marketing Executive

N. L. Dalmia Institute of Management Studies and Research

(A School of Excellence of N. L. Dalmia Educational Society)

M: +91-9619233409 | M: +91-9930999555 | B: (022) 4299 0033 (Ext. 680)

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List of Course Recommendations.docx  
14K



# **N. L. Dalmia<sup>®</sup>** **Institute of Management Studies and Research**

*(A School of Excellence of N. L. Dalmia Educational Society)*

**A.Y. 2020-21**  
**Markstat**

**A.Y 2020-21 (Batch 2019-21)**

**Mark Strat- Marketing Simulation**

Markstrat – Simulation enables the students to be experience a realistic business and marketing situations that enabled the students to behave in a professional setting to acquire critical on-the-job skills in a risk-free and truly engaging environment. By assuming to take executive roles in a multi-million-dollar firm, students learn to make key decisions in strategy, operations, sales, R&D as well as finance to grow their business amongst strong competition. Students also learnt to develop both hard and soft skills alike business insights, thinking critically, working effectively as a team and managing stress under pressure. The simulation exercise was conducted by Ms. Rashmi Jain in the ICT lab. The licenses were procured from Mark Strat. All the students of Marketing participated in the simulation. Students have taken this simulation exercise very well. In the two years PGDM course alike other students, Marketing students were also taught different subjects along with relevant marketing concepts and specialization courses. For them to be truly industry ready, it is important that the students understand the interplay of the conceptual areas and the impact of environmental factors on the success of organizational strategy.

Marketing Simulation helped students to understand the subjects like Marketing Strategy, Product and Brand Management, Negotiation Skills, Selling and Marketing Financial products in real world perspectives. This simulation enabled the students with real-life environment challenges; students used the knowledge of subjects to overcome the challenges. Marketing simulation was conducted in a competitive (game) format for two continuous days. Students were divided in teams. Each team represented a company in a given industry within a hypothetical market. The teams competed with each other to maximize certain business KPIs over various stages. The competition was very innovative and the winners were awarded with certificates.

Dr. Joyeeta Chatterjee

Professor and HoD, Marketing



Strategic digital marketing concepts that transform your participants into digital experts.

- Experienced marketers, MBA and Master students
- 12 to 20 hours
- B2C durable goods (electronics)

**Learning outcomes**

- Know-how to blend digital and traditional media in developing a marketing plan.
- Segment, target and position a portfolio of brands on a digital-sensitive market.
- Manage digital marketing as a profit-center.

[learn more](#)



Fundamental strategic marketing concepts to turn your participants into effective marketers.

- Experienced marketers, MBA and Master students
- 12 to 20 hours
- B2C durable goods (electronics), B2C consumer goods (cosmetics), B2B (mechatronics)

**Learning outcomes**

- Learn the fundamental strategic marketing concepts: segmentation, targeting, positioning, brand portfolio strategies.
- Manage established and emerging market strategies.
- Experience essential marketing tools and conduct market and competitive analysis.

[learn more](#)



Circular economy & sustainability with Circular Markstrat to get participants to embrace the circular economy.

- Experienced marketers, MBA and Master students
- 12 to 20 hours
- B2C durable goods (electronics)

**Learning outcomes**

- Design eco-friendly products & business processes
- Discover how sustainability & profitability can be synergistic
- Adopt digital transformation for environmental good

[learn more](#)



Innovation concepts with Blue Ocean Strategy to create trends, eliminate competitors and own your market.

- Experienced executives in strategy and innovation, MBA and Master students
- 6-12 hours of decision-making
- Video game console industry, retail industry

**Learning outcomes**

- Adopt an innovation mindset & creative perspective
- Build know-how on creating new market demand
- Comprehend Blue Ocean theory from conception to delivery in all business aspects

[learn more](#)



REVMANEX

**Achieve revenue management excellence in sales.**

- Sales professionals & undergraduate, graduate & executive students in sales & marketing
- 2-3 hours of decision-making
- Consumer goods industry

**Learning outcomes**

- Adopt a value creation mindset for sustainable growth
- Become a savvy negotiator
- Embed customer-centricity in the sales process

[learn more](#)



BrandPRO

**Step into a Brand Manager's role.**

- Core Marketing Courses, Academic & Executive levels
- 3 hours
- B2C Durable Goods (electronics)

**Learning outcomes**

- Develop acumen for successful brand management
- Learn targeting and positioning concepts through product, pricing and communication decisions.
- Develop a customer-centric mindset

[learn more](#)



DIGITAL MediaPRO

**Become savvy digital transformers.**

- Core Marketing, Media Courses, Academic & Executive levels
- 3 hours
- Energy Drink Industry

**Learning outcomes**

- Learn media planning, execution tactics, specific language
- Know how to blend digital and traditional media to execute a media strategy
- Navigate key digital media challenges.

[learn more](#)



MixPRO

**Master the 4Ps and effectively apply the marketing mix.**

- Core Marketing Courses, Academic & Executive levels
- 3 hours
- B2C Durable Goods (electronics)

**Learning outcomes**

- Achieve brand performance through coherent and tactical marketing mix decisions
- Learn key marketing mix levers.
- Understanding of the 4Ps of the marketing mix

[learn more](#)





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(A School of Excellence of N. L. Dalmia Educational Society)

**Following Students Completed Markstat Program A.Y 2020-21**

| Sr. No. | Specialisation | Name of the Candidate            | Student enrollment number |
|---------|----------------|----------------------------------|---------------------------|
| 1       | Marketing      | Aaditya Amrendra Bhardwaj        | PM1921-C24                |
| 2       | Marketing      | Akash Anand Patwal               | PM1921-C20                |
| 3       | Marketing      | Akshay Vikas Patil               | PM1921-C15                |
| 4       | Marketing      | Aniruddha Vijay Katkar           | PM1921-C18                |
| 5       | Marketing      | Apurva Arun Kamat                | PM1921-C25                |
| 6       | Marketing      | Arjun Nandkumar Nair             | PM1921-C17                |
| 7       | Marketing      | Bhagwan Giridhar Salunkhe        | PM1921-C36                |
| 8       | Marketing      | Bhavya Bharat Modi               | PM1921-C39                |
| 9       | Marketing      | Devika Girish Thakur             | PM1921-C11                |
| 10      | Marketing      | Harsh Yashwant Chordia           | PM1921-C45                |
| 11      | Marketing      | Jatin Jack Gaud                  | PM1921-C03                |
| 12      | Marketing      | Jigneshkumar Niranjanbhai Pandya | PM1921-C38                |
| 13      | Marketing      | Kanchi Atul Mehta                | PM1921-C27                |
| 14      | Marketing      | Karishma Dharmin Desai           | PM1921-C32                |
| 15      | Marketing      | Karishma Raju Rajwani            | PM1921-C31                |
| 16      | Marketing      | Kaushal Sanjeev Tibrewal         | PM1921-C34                |
| 17      | Marketing      | Kedar Nitin Jatkar               | PM1921-C10                |
| 18      | Marketing      | Kishan Jagadish J                | PM1921-C44                |
| 19      | Marketing      | Lenryl Robert Sequeira           | PM1921-C09                |
| 20      | Marketing      | Mohit Mahesh Bashani             | PM1921-C22                |
| 21      | Marketing      | Nakul Girish Kukadapwar          | PM1921-C04                |
| 22      | Marketing      | Pooja Hemant Vadia               | PM1921-C23                |
| 23      | Marketing      | Pranjali Satish Mate             | PM1921-C19                |
| 24      | Marketing      | Pratish Prakash More             | PM1921-C43                |
| 25      | Marketing      | Ritika Ashok Murawala            | PM1921-C41                |
| 26      | Marketing      | Saloni Santosh Naik              | PM1921-C02                |
| 27      | Marketing      | Sampada Suresh Inarkar           | PM1921-C35                |
| 28      | Marketing      | Shefali Vishvesh Borkar          | PM1921-C21                |
| 29      | Marketing      | Shikha Jaipal Sidana             | PM1921-C06                |
| 30      | Marketing      | Shivam Sanjay Seth               | PM1921-C16                |
| 31      | Marketing      | Simona Christopher Bastian       | PM1921-C13                |
| 32      | Marketing      | Smrithi Nanda Pillai             | PM1921-C42                |
| 33      | Marketing      | Snehal Ajay Waigaonkar           | PM1921-C12                |
| 34      | Marketing      | Tejas Sanjay Raul                | PM1921-C26                |
| 35      | Marketing      | Trishank Vijay Kumbhare          | PM1921-C33                |
| 36      | Marketing      | Tushar Dilip Kamley              | PM1921-C46                |



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**Following Students Completed Markstat Program A.Y 2020-21**

| Sr. No. | Specialisation | Name of the Candidate    | Student enrollment number |
|---------|----------------|--------------------------|---------------------------|
| 37      | Marketing      | Urvi Ajay Sanghavi       | PM1921-C40                |
| 38      | Marketing      | Vaishnavi Haridas Shetty | PM1921-C01                |
| 39      | Marketing      | Vrushali Suresh Bugde    | PM1921-C29                |
| 40      | Marketing      | Vyas Janardhan Rampelli  | PM1921-C14                |

Head of Accreditation

Prof. Dr. Vaishali Kulkarni





## Supporting Documents

### 1.3.2. Number of value-added courses for imparting transferable and life skills offered during last five years

| Sr. No.  | Details   |
|--|---|
| <b>Number of value-added courses for imparting transferable and life skills offered during A.Y.2020-21</b> |   |
|  | <b>Course Era</b>   |
| 1  | AI For Everyone   |
| 2  | Analyzing Company Performing using Ratios                       |
| 3  | Behavioral Finance  |
| 4  | Brand Management Aligning Business, Brand and Behaviour         |
| 5  | Business Analytics for Decision Making                          |
| 6  | Capstone:Retrieving,Processing,and Visualizing Data with Python |
| 7  | Compare Stock Returns with Google Sheets                        |
| 8  | Construct Stock Market Indices                                  |
| 9  | Create a Budget with Google Sheets                              |
| 10   | Create a Google Ads Search Campaign                             |
| 11   | creative Thinking:Techniques and Tools for Success              |
| 12   | Customer Analytics  |
| 13   | Diversity and inclusion in the workplace                        |



## Supporting Documents

### 1.3.2. Number of value-added courses for imparting transferable and life skills offered during last five years

| Sr. No. | Details  |
|---------|--|
|         | <b>Number of value-added courses for imparting transferable and life skills offered during A.Y.2020-21</b> |
| 14      | Effective Sales - An Overview  |
| 15      | Excel Skills for Business  |
| 16      | Finance for Everyone Decisions   |
| 17      | Finance for Everyone Markets   |
| 18      | Financial Markets  |
| 19      | FinTech and the Transformation in Financial Services   |
| 20      | FinTech Foundations and Overview   |
| 21      | Forensic Accounting and Fraud Examination  |
| 22      | Foundations of Business Strategy   |
| 23      | Global Financial Markets   |
| 24      | Introduction of People Analytics   |
| 25      | Introduction to Financial Markets  |
| 26      | Introduction to Personal Branding  |
| 27      | Introduction to Valuation with WACC  |



## Supporting Documents

### 1.3.2. Number of value-added courses for imparting transferable and life skills offered during last five years

| Sr. No. | Details  |
|---------|--|
|         | <b>Number of value-added courses for imparting transferable and life skills offered during A.Y.2020-21</b> |
| 28      | Investment Risk Management   |
| 29      | Investment Strategy  |
| 30      | Language and Tools of Financial Analysis   |
| 31      | Leading Teams  |
| 32      | Learning How to Learn: Powerful mental tools to help you master tough subjects                             |
| 33      | Managing as a Coach  |
| 34      | Managing Project Risks and Changes   |
| 35      | Managing Talents   |
| 36      | Market Research and Consumer Behavior  |
| 37      | Marketing Analytics  |
| 38      | Marketing Analytics: Know your customers   |
| 39      | People Analytics   |
| 40      | Preparing to Manage Human Resource   |
| 41      | Programming for Everybody (Getting Started with Python)  |







**Goals**

- Take a free course
- Earn a Degree >
- Earn a Certificate >
- Advance your career >
- Find your new career

**Subjects**

- Data Science >
- Business >**
- Computer Science >
- Information Technology >
- Language Learning >
- Health >
- Personal Development >
- Physical Science and Engineering >
- Social Sciences >
- Arts and Humanities >
- Math and Logic >

[Browse all subjects](#)

**Business**

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**Executive MBA**
- University of Illinois at Urbana-Champaign  
**Master of Business Administration (IMBA)**
- University of Michigan  
**Master of Public Health**
- University of North Texas  
**Bachelor of Applied Arts and Sciences**
- Georgetown University  
**Bachelor of Arts in Liberal Studies**
- University of Colorado Boulder  
**Master of Engineering in Engineering Management**

[View all degrees](#)

**Certificate programs**

In 3-9 months, gain the skills to break into a new career or take your career to the next level.

- Intuit Academy Bookkeeping  
No prerequisites • Self-paced
- Meta Social Media Marketing  
No prerequisites • Self-paced
- Google Digital Marketing & E-commerce  
No prerequisites • Self-paced
- Salesforce Sales Development Representative  
No prerequisites • Self-paced
- SAP Technology Consultant

[View all Certificates](#)

**Get started**

- Launch your career
- Free courses
- Most popular
- New courses
- Guided Projects under 2 hours

**Popular skills**

- Project Management
- Microsoft Excel
- Excel
- Blockchain
- Digital Marketing
- Data Analytics
- Power BI
- Design
- Communication Skills
- Marketing



**Goals**

- Take a free course
- Earn a Degree >
- Earn a Certificate >
- Advance your career >
- Find your new career

**Subjects**

- Data Science >**
- Business >
- Computer Science >
- Information Technology >
- Language Learning >
- Health >
- Personal Development >
- Physical Science and Engineering >
- Social Sciences >
- Arts and Humanities >
- Math and Logic >

[Browse all subjects](#)

**Data Science**

**Degrees**

Breakthrough pricing on 100% online degrees designed to fit into your life.

- Birla Institute of Technology & Science, Pilani  
**Bachelor of Science in Computer Science**
- University of Michigan  
**Master of Applied Data Science**
- Imperial College London  
**Master of Science in Machine Learning and Data Science**
- University of Colorado Boulder  
**Master of Science in Data Science**
- University of Leeds  
**MSc Data Science (Statistics)**
- Northeastern University  
**MS in Management: Healthcare**

[View all degrees](#)

**Certificate programs**

In 3-9 months, gain the skills to break into a new career or take your career to the next level.

- IBM Data Science  
No prerequisites • Self-paced
- IBM Data Analyst  
No prerequisites • Self-paced
- Google Data Analytics  
No prerequisites • Self-paced
- Google Advanced Data Analytics
- Google Business Intelligence

[View all Certificates](#)

**Get started**

- Launch your career
- Free courses
- Most popular
- New courses
- Guided Projects under 2 hours
- New! Machine Learning Specialization

**Popular skills**

- Python
- SQL
- Microsoft Excel
- Excel
- Machine Learning
- Data Science
- Data Analytics
- Power BI



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| Sr. No   | Name of the Student  | Certificate | Name of the course/Events  | Company/university                 |
|--|----------------------|-------------|--|------------------------------------|
| <b>Following students attended Coursera Program Year 2020-2021</b> |                      |             |  |                                    |
| 1  | Tushar Sachdeva      | Coursera    | Excel Skills for Business  | Macquari Univerity Sydney          |
| 2  | Tushar Sachdeva      | Coursera    | The Language and Tools of Finance Analysis                         | The University of Melbourne        |
| 3  | Tushar Sachdeva      | Coursera    | Construct Stock Market Indices                                     | Coursera Project Network           |
| 4  | Tushar Sachdeva      | Coursera    | Stock Valuation with Comparable Companies Analysis                 | Coursera Project Network           |
| 5  | Tushar Sachdeva      | Coursera    | Finance for Everyone Decisions                                     | McMASTER University                |
| 6  | Tushar Sachdeva      | Coursera    | Finance for Everyone Markets                                       | McMASTER University                |
| 7  | Tushar Sachdeva      | Coursera    | Compare Stock Returns with Google Sheets                           | Coursera Project Network           |
| 8  | Tushar Sachdeva      | Coursera    | Introduction to Valuation with WACC                                | Coursera Project Network           |
| 9  | Shreesha Padunnayil  | Coursera    | Forensic Accounting and Fraud Examination                          | West Virginia University           |
| 10   | Shreesha Padunnayil  | Coursera    | Six sigma Principles   | Kennesaw State University          |
| 11   | Kiran Maurya         | Coursera    | Trading Basics   | ISB                                |
| 12   | Azim Bawa            | Coursera    | Global Financial Markets   | Rice University                    |
| 13   | Azim Bawa            | Coursera    | FinTech and the Transformation in Financial Services               | CBS                                |
| 14   | Gauri Chandgude      | Coursera    | Business Analytics for Decision Making                             | University of Colorado             |
| 15   | Gauri Chandgude      | Coursera    | Effective Sales - An Overview                                      | FIA                                |
| 16   | Afreen Khan          | Coursera    | Market Research and Consumer Behavior                              | IE Reinventing Higher Education    |
| 17   | Shweta Pednekar      | Coursera    | Brand Management Aligning Business, Brand and Behaviour            | University of London               |
| 18   | Shweta Pednekar      | Coursera    | Research Proposal: Initiating Research                             | UCDAVIS                            |
| 19   | Shweta Pednekar      | Coursera    | Market Research and Consumer Behavior                              | IE Reinventing Higher Education    |
| 20   | Shweta Pednekar      | Coursera    | Create a Google Ads Search Campaign                                | Coursera Project Network           |
| 21   | Prasad Gharat        | Coursera    | Preparing to Manage Human Resource                                 | University of Minnesota            |
| 22   | Prasad Gharat        | Coursera    | Excel Skills for Business - Essentials                             | Macquari Univerity Sydney          |
| 23   | Prasad Gharat        | Coursera    | Excel Skills for Business - Intermediate - I                       | Macquari Univerity Sydney          |
| 24   | Prasad Gharat        | Coursera    | Excel Skills for Business - Intermediate - II                      | Macquari Univerity Sydney          |
| 25   | Shruti Tambe         | Coursera    | Leading Teams  | University of Michigan             |
| 26   | Shruti Tambe         | Coursera    | Managing Talents   | University of Michigan             |
| 27   | Shruti Tambe         | Coursera    | Introduction of People Analytics                                   | MIPT                               |
| 28   | Shruti Tambe         | Coursera    | Managing Project Risks and Changes                                 | University of California           |
| 29   | Sarang Giradkar      | Coursera    | Language and Tools of Fiancial Analysis                            | The University of Melbourne        |
| 30   | Ritika Toshniwal     | Coursera    | Managing as a Coach  | UCDAVIS                            |
| 31   | Pradnya Sawal        | Coursera    | AI For Everyone  | DeepLearning.AI                    |
| 32   | Pradnya Sawal        | Coursera    | Successful Negotiation: Essential Strategies and Skills            | University of Michigan             |
| 33   | Mohammad Rehan Khan  | Coursera    | Using Databases With Python  | University of Michigan             |
| 34   | Mohammad Rehan Khan  | Coursera    | Capstone: Retrieving, Processing, and Visualizing Data with Python | University of Michigan             |
| 35   | Avani Parekh         | Coursera    | Programming for Everybody(Getting Started with Python)             | University of Michigan             |
| 36   | Pratik Jadhav        | Coursera    | Create a Budget with Google Sheets                                 | Coursera Project Network           |
| 37   | Shreya Vij           | Coursera    | People Analytics   | Wharton University of Pennsylvania |
| 38   | Shreya Vij           | Coursera    | Managing as a Coach  | UCDAVIS                            |
| 39   | Shreya Vij           | Coursera    | Customer Analytics   | Wharton University of Pennsylvania |
| 40   | Supriya Sawant       | Coursera    | AI For Everyone  | DeepLearning.AL                    |
| 41   | Supriya Sawant       | Coursera    | Marketing Analytics: Know your customers                           | Macquarie University Sydney        |
| 42   | Supriya Sawant       | Coursera    | Excel Skills for Business: Essentials                              | Macquarie University Sydney        |
| 43   | Supriya Sawant       | Coursera    | Effective Sales - An Overview                                      | FIA                                |
| 44   | Tapasya Nerurkar     | Coursera    | Stock Valuation with Comparable Companies Analysis                 | Coursera Project Network           |
| 45   | Tapasya Nerurkar     | Coursera    | Introduction to Financial Markets                                  | ISB                                |
| 46   | Dhawani Prabhawalkar | Coursera    | Financial Markets  | Yale University                    |
| 47   | Dhawani Prabhawalkar | Coursera    | FinTech and the Transformation in Financial Services               | CBS                                |
| 48   | Dhawani Prabhawalkar | Coursera    | Stock Valuation with Comparable Companies Analysis                 | Coursera Project Network           |





**N. L. Dalmia**<sup>®</sup>

**Institute of Management Studies and Research**  
(A School of Excellence of N. L. Dalmia Educational Society)

| Sr. No   | Name of the Student | Certificate | Name of the course/Events   | Company/university                                 |
|--|---------------------|-------------|---|--|
| <b>Following students attended Coursera Program Year 2020-2021</b> |                     |             |   |  |
| 49   | Javed Shaikh        | Coursera    | creative Thinking:Techniques and Tools for Success                            | Imperial College London                            |
| 50   | Javed Shaikh        | Coursera    | Financial Markets   | Yale University                                    |
| 51   | Javed Shaikh        | Coursera    | FinTech Foundations and Overview  | The Hong Kong University of Science and Technology |
| 52   | Javed Shaikh        | Coursera    | Introduction to Personal Branding   | University of Virginia                             |
| 53   | Javed Shaikh        | Coursera    | Stock Valuation with Comparable Companies Analysis                            | Coursera Project Network                           |
| 54   | Javed Shaikh        | Coursera    | Stock Valuation with Dividend Discount Model                                  | Coursera Project Network                           |
| 55   | Javed Shaikh        | Coursera    | Work Smarter,Not Harder:Time Management for Personal & Productivity           | UCI  |
| 56   | Ashish Sharma       | Coursera    | Programming for Everybody(Getting Started with Python)                        | University of Michigan                             |
| 57   | Angika Roy          | Coursera    | Marketing Analytics   | University of Virginia                             |
| 58   | Angika Roy          | Coursera    | Programming for Everybody(Getting Started with Python)                        | University of Michigan                             |
| 59   | Angika Roy          | Coursera    | AI For Everyone   | DeepLearning.AI                                    |
| 60   | Aditi Malpani       | Coursera    | Introduction to Financial Markets   | ISB  |
| 61   | Shreya Ghosh        | Coursera    | FinTech and the Transformation in Financial Services                          | CBS  |
| 62   | Richa Warang        | Coursera    | Foundations of Business Strategy  | University of Virginia                             |
| 63   | Richa Warang        | Coursera    | FinTech and the Transformation in Financial Services                          | CBS  |
| 64   | Richa Warang        | Coursera    | Learning How to Learn:Powerful mental toots to help you master tough subjects | McMASTER University                                |
| 65   | Pratik Giri         | Coursera    | FinTech and the Transformation in Financial Services                          | CBS  |
| 66   | Pratik Giri         | Coursera    | The Language and Tools of Financial Analysis                                  | The University of Melbourne                        |
| 67   | Meet Shah           | Coursera    | Analyzing Company Performing using Ratios                                     | Coursera Project Network                           |
| 68   | Meet Shah           | Coursera    | Investment Strategy   | ISB  |
| 69   | Meet Shah           | Coursera    | Investment Risk Management  | Coursera Project Network                           |
| 70   | Meet Shah           | Coursera    | Behavioral Finance  | Duke University                                    |
| 71   | Devika Ghosh        | Coursera    | Excel Skills for Business Essentials  | Macquarie University Sydney                        |
| 72   | Devika Ghosh        | Coursera    | Programming for Everybody(Getting Started with Python)                        | University of Michigan                             |
| 73   | Arti Jani           | Coursera    | Managing as a Coach   | UCDAVIS  |
| 74   | Arti Jani           | Coursera    | Diversity and inclusion in the workplace                                      | ESSEC Business School                              |
| 75   | Abrar Khan          | Coursera    | Trading Algorithms  | ISB  |

Head of Accreditation

  
Prof. (Dr.) Vaishali Kulkarni







**MACQUARIE**  
University  
SYDNEY · AUSTRALIA

Nov 27, 2020

**TUSHAR SACHDEVA**

has successfully completed

**Excel Skills for Business: Essentials**

an online non-credit course authorized by Macquarie University and offered through  
Coursera

Nicky Bull, Dr Prashan S. M. Karunaratne, FHEA, A/Professor Yvonne Breyer

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/9Q56C8MZV](https://coursera.org/verify/9Q56C8MZV)

Coursera has confirmed the identity of this individual and  
participation in the

1



Nov 20, 2020

**TUSHAR SACHDEVA**

has successfully completed

**The Language and Tools of Financial Analysis**

an online non-credit course authorized by The University of Melbourne and offered through Coursera

COURSE  
CERTIFICATE



Dean, Faculty of Business and Economics  
Sidney Myer Chair of Commerce

Associate Professor  
Faculty of Business and Economics

Verify at [coursera.org/verify/UKLP4VYPAFQ2](https://coursera.org/verify/UKLP4VYPAFQ2)

Coursera has confirmed the identity of this individual and their participation in the course.

This certificate does not confer credit towards a degree, nor student status, at the issuing University.



Oct 28, 2020

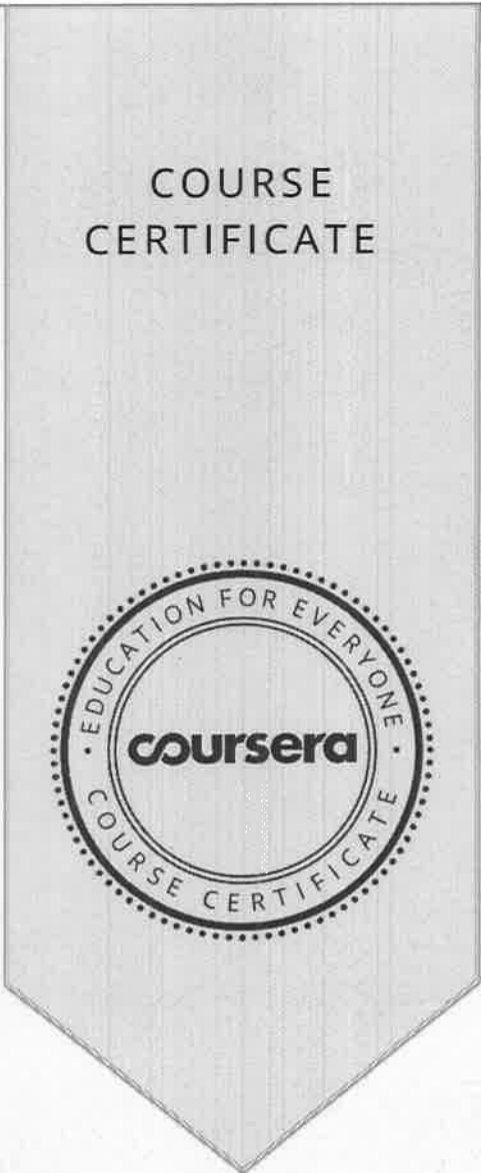
# TUSHAR SACHDEVA

has successfully completed

## Construct Stock Market Indices

an online non-credit course authorized by Coursera Project Network and offered through Coursera

Bekhruzбек Ochilov, ACSI  
Investment Analyst



COURSE  
CERTIFICATE



Verify at [coursera.org/verify/8CMHDTPJ34J](https://coursera.org/verify/8CMHDTPJ34J)

Coursera has confirmed the identity of this individual and their participation in the course.





Nov 10, 2020

# TUSHAR SACHDEVA

has successfully completed

## Stock Valuation with Comparable Companies Analysis

an online non-credit course authorized by Coursera Project Network and offered through Coursera

Bekhruzбек Ochilov, ACSI  
Investment Analyst

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/2MPLPR47RRSR](https://coursera.org/verify/2MPLPR47RRSR)  
Coursera has confirmed the identity of this individual and their participation in the course.

4



COURSE  
CERTIFICATE

Oct 22, 2020

**TUSHAR SACHDEVA**

has successfully completed

**Finance for Everyone: Decisions**

an online non-credit course authorized by McMaster University and offered through  
Coursera



*Arshad Ahmad*

Arshad Ahmad  
Professor  
DeGroot School of Business

Verify at [coursera.org/verify/TXZGEGZKBLEY](https://coursera.org/verify/TXZGEGZKBLEY)  
Coursera has confirmed the identity of this individual and their  
participation in the course.



Nov 10, 2020

**TUSHAR SACHDEVA**

has successfully completed

**Finance for Everyone: Markets**

an online non-credit course authorized by McMaster University and offered through Coursera

A handwritten signature in cursive script that reads "Arshad Ahmad".

Arshad Ahmad  
Professor  
DeGroote School of Business

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/3SABL5Z344WX](https://coursera.org/verify/3SABL5Z344WX)  
Coursera has confirmed the identity of this individual and their participation in the course.

6



May 8, 2021

# TUSHAR SACHDEVA

has successfully completed

## Compare Stock Returns with Google Sheets

an online non-credit course authorized by Coursera Project Network and offered through Coursera

Bekhruzбек Ochilov, ACSI  
Investment Analyst

### COURSE CERTIFICATE



Verify at [coursera.org/verify/6VCT568LN6KP](https://coursera.org/verify/6VCT568LN6KP)  
Coursera has confirmed the identity of this individual and their participation in the course.



Mar 27, 2021

# TUSHAR SACHDEVA

has successfully completed

## Introduction to Valuation with WACC

an online non-credit course authorized by Coursera Project Network and offered through Coursera

Bekhruzbeq Ochilov, ACSI  
Investment Analyst

### COURSE CERTIFICATE



Verify at [coursera.org/verify/ZAXUP43FPYMP](https://coursera.org/verify/ZAXUP43FPYMP)

Coursera has confirmed the identity of this individual and their participation in the course.





COURSE  
CERTIFICATE

Nov 28, 2020

**Shreesha Shreekumar  
Padunnayil**

has successfully completed

**Forensic Accounting and Fraud Examination**

an online non-credit course authorized by West Virginia University and offered through  
Coursera



Richard A. Riley, Jr., Ph.D | Richard Dull, Ph.D. CPA(NC)/CFF, CISA, CFE | John D. Gill, J.D., CFE  
College of Business and Economics  
West Virginia University

Verify at [coursera.org/verify/QMBNKJTVLD6T](https://coursera.org/verify/QMBNKJTVLD6T)  
Coursera has confirmed the identity of this individual and their  
participation in the course.





## COURSE CERTIFICATE

Nov 30, 2020

# Shreesha Shreekumar Padunnayil

has successfully completed

## Six Sigma Principles

an online non-credit course authorized by University System of Georgia and offered through Coursera



Bill Bailey, PhD; Gregory L. Wiles, Ph.D., P.E.; Dr. David Cook; Christina R. Scherrer, PhD  
Assistant Professor; Interim Chair and Assistant Professor; Assistant Professor of Mechanical Engineering Technology;  
Professor  
Southern Polytechnic College of Engineering and Engineering Technology  
Kennesaw State University

Verify at [coursera.org/verify/7BA](https://coursera.org/verify/7BA)  
Coursera has confirmed the identity of this individual participant

10



# ISB

Nov 20, 2020

## Kiran Shivkumar Maurya

has successfully completed

### Trading Basics

an online non-credit course authorized by Indian School of Business and offered through Coursera

Ramabhadran Thirumalai  
Assistant Professor  
Indian School of Business

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/S8329KBGURGM](https://coursera.org/verify/S8329KBGURGM)  
Coursera has confirmed the identity of this individual and their participation in the course.





# RICE UNIVERSITY

Nov 24, 2020

**Azim Bawa**

has successfully completed

**Global Financial Markets and Instruments**

an online non-credit course authorized by Rice University and offered through Coursera

*Arzu Ozoguz*

Arzu Ozoguz  
Finance Faculty  
Jones Graduate School of Business

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/G3SLRZP9BQGT](https://coursera.org/verify/G3SLRZP9BQGT)  
Coursera has confirmed the identity of this individual and their  
participation in the course.

Nov 29, 2020

**Azim Bawa**


has successfully completed

**FinTech and the Transformation in Financial  
Services**

an online non-credit course authorized by Copenhagen Business School and offered  
through Coursera



  
Jonas Hedman  
Associate Professor  
Department of Digitalization, Copenhagen Business School

  
Stefan Henningsson  
Associate Professor  
Department of Digitalization

Verify at [coursera.org/verify/FZU6UWW79A6N](https://coursera.org/verify/FZU6UWW79A6N)  
Coursera has confirmed the identity of this individual and their  
participation in the course.



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

Oct 31, 2020

**GAURI SURESH CHANDGUDE**

has successfully completed

**Business Analytics for Decision Making**

an online non-credit course authorized by University of Colorado Boulder and offered through Coursera

M. L.

Manuel Laguna  
MediaOne Professor of Management Science  
Leeds School of Business

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/K9LV7J9YEDTK](https://coursera.org/verify/K9LV7J9YEDTK)

Coursera has confirmed the identity of this individual and their participation in the course.

14



Oct 26, 2020

# GAURI SURESH CHANDGUDE

has successfully completed

## Effective Sales - An Overview

an online non-credit course authorized by Fundação Instituto de Administração and offered through Coursera

Nelson Yoshida, Samantha Mazzero, Cesar Rodrigues and Edson Ito

## COURSE CERTIFICATE



Verify at [coursera.org/verify/6ZGGB2ZV2VWS](https://coursera.org/verify/6ZGGB2ZV2VWS)  
Coursera has confirmed the identity of this individual and their participation in the course.





04/29/2020

**Afreen Hamid Khan**

has successfully completed

**Market Research and Consumer Behavior**

an online non-credit course authorized by IE Business School and offered through Coursera

A handwritten signature in black ink that reads 'Shameek Sinha'.

Shameek Sinha  
Professor of Marketing

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/9JXWR5MBNWGM](https://coursera.org/verify/9JXWR5MBNWGM)  
Coursera has confirmed the identity of this individual and their participation in the course.



**UNIVERSITY  
OF LONDON**

Nov 5, 2020

**SHWETA PEDNEKAR**

has successfully completed

**Brand Management: Aligning Business, Brand and  
Behaviour**

an online non-credit course authorized by University of London and London Business  
School and offered through Coursera

*Nader Tavassoli*

Professor Nader Tavassoli, London Business School

**COURSE  
CERTIFICATE**



Verify at [coursera.org/verify/3PVVDJF85MKE](https://coursera.org/verify/3PVVDJF85MKE)

Coursera has confirmed the identity of this individual and their  
participation in the course.

**UCDAVIS**

Oct 27, 2020

**SHWETA PEDNEKAR**

has successfully completed

**Research Proposal: Initiating Research**

an online non-credit course authorized by University of California, Davis and offered through Coursera



Jim Fong  
Director  
UPCEA Center for Research and Marketing Strategy  
UC Davis Division of Continuing and Professional Education

**COURSE  
CERTIFICATE**



Verify at [coursera.org/verify/LC6MTP7TT7LR](https://coursera.org/verify/LC6MTP7TT7LR)  
Coursera has confirmed the identity of this individual and their participation in the course.



Oct 23, 2020

**Shweta Amol Pednekar**

has successfully completed

**Market Research and Consumer Behavior**

an online non-credit course authorized by IE Business School and offered through Coursera

Shameek Sinha  
Professor of Marketing

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/ZAPLNFBJ6NGM](https://coursera.org/verify/ZAPLNFBJ6NGM)  
Coursera has confirmed the identity of this individual and their participation in the course.



Oct 23, 2020

# Shweta Amol Pednekar

has successfully completed

## Create a Google Ads Search Campaign

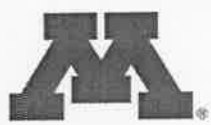
an online non-credit course authorized by Coursera Project Network and offered through Coursera

Angelo Paolillo  
Digital consultant - Director  
Clearup.com

### COURSE CERTIFICATE



Verify at [coursera.org/verify](https://coursera.org/verify)  
Coursera has confirmed the identity of this participant



UNIVERSITY OF MINNESOTA  
Driven to Discover<sup>SM</sup>

COURSE  
CERTIFICATE

Apr 16, 2021

**Prasad Gharat**

has successfully completed

**Preparing to Manage Human Resources**

an online non-credit course authorized by University of Minnesota and offered through  
Coursera



John W. Budd  
Professor and Director  
Center for Human Resources and Labor Studies

Verify at [coursera.org/verify/YE6EXBWSNUER](https://coursera.org/verify/YE6EXBWSNUER)  
Coursera has confirmed the identity of this individual and their  
participation in the course.





**MACQUARIE**  
University  
SYDNEY • AUSTRALIA

Apr 18, 2021

**Prasad Gharat**

has successfully completed

**Excel Skills for Business: Essentials**

an online non-credit course authorized by Macquarie University and offered through  
Coursera

Nicky Bull, Lecturer and Lead Content Designer  
Dr Prashan S. M. Karunaratne, Lecturer - Teaching & Leadership | Department of Actuarial Studies & Business Analytics  
A/Professor Yvonne Breyer, Director, Learning & Teaching | Head, Learning Futures

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/4R5V7QKES9RB](https://coursera.org/verify/4R5V7QKES9RB)

Coursera has confirmed the identity of this individual and their  
participation in the course.



**MACQUARIE**  
University  
SYDNEY • AUSTRALIA

Apr 27, 2021

**Prasad Gharat**

has successfully completed

**Excel Skills for Business: Intermediate I**

an online non-credit course authorized by Macquarie University and offered through  
Coursera

COURSE  
CERTIFICATE



Nicky Ball, Lecturer and Lead Content Designer  
Dr Prashan S. M. Karunaratne, Lecturer - Teaching & Leadership | Department of Actuarial Studies & Business Analytics  
A/Professor Yvonne Breyer, Director, Learning & Teaching | Head, Learning Futures

Verify at [coursera.org/verify/WMMXBLK7A4BH](https://coursera.org/verify/WMMXBLK7A4BH)

Coursera has confirmed the identity of this individual and their  
participation in the course.



**MACQUARIE**  
University  
SYDNEY · AUSTRALIA

May 2, 2021

**Prasad Gharat**

has successfully completed

**Excel Skills for Business: Intermediate II**

an online non-credit course authorized by Macquarie University and offered through  
Coursera

Nicky Bull, Lecturer and Lead Content Designer  
Dr Prashan S. M. Karunaratne, Lecturer - Teaching & Leadership | Department of Actuarial Studies & Business Analytics  
A/Professor Yvonne Breyer, Director, Learning & Teaching | Head, Learning Futures

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/KAEYCNZXRSE](https://coursera.org/verify/KAEYCNZXRSE)  
Coursera has confirmed the identity of this individual and their  
participation in the course.

24



COURSE  
CERTIFICATE

Nov 20, 2020

**Shruti Suresh Tambe**

has successfully completed

**Leading Teams**

an online non-credit course authorized by University of Michigan and offered through Coursera



*D. Scott DeRue*

*[Signature]*

Scott DeRue  
Edward J Frey Dean  
Professor of Management  
Director-Sanger Leadership Center  
Faculty Director-Emerging Leaders Program  
Ross School of Business

Maxim Sytch  
Michael R and Mary Kay Hallman Fellow  
Associate Professor  
Ross School of Business

Verify at [coursera.org/verify/FBGJC2PMUKVD](https://coursera.org/verify/FBGJC2PMUKVD)  
Coursera has confirmed the identity of this individual and their participation in the course.



Nov 2, 2020

**Shruti Suresh Tambe**

has successfully completed

**Managing Talent**

an online non-credit course authorized by University of Michigan and offered through Coursera

COURSE  
CERTIFICATE



*D. Scott DeRue*     *Cheri Alexander*

Scott DeRue, Ph.D., Maxim Sytch, Ph.D., Cheri Alexander

Verify at [coursera.org/verify/Q53W2HQXJFED](https://coursera.org/verify/Q53W2HQXJFED)  
Coursera has confirmed the identity of this individual and their participation in the course.



Nov 16, 2020

**Shruti Suresh Tambe**

has successfully completed

**Introduction to People Analytics**

an online non-credit course authorized by Moscow Institute of Physics and Technology and offered through Coursera

COURSE  
CERTIFICATE



Ilya Breyman  
Adjunct Professor  
CIET MIPT

Alexey Dolinskiy  
Adjunct Professor  
CIET MIPT

Verify at [coursera.org/verify/NFNSK6GGQPX5](https://coursera.org/verify/NFNSK6GGQPX5)  
Coursera has confirmed the identity of this individual and their participation in the course.



Oct 23, 2020

# Shruti Suresh Tambe

has successfully completed

## Managing Project Risks and Changes

an online non-credit course authorized by University of California, Irvine and offered through Coursera

*Margaret M. Meloni*

Margaret Meloni, MBA, PMP  
Instructor  
University of California, Irvine Division of Continuing Education

## COURSE CERTIFICATE



Verify at [coursera.org/verify/XU9ZRPTV9PVE](https://coursera.org/verify/XU9ZRPTV9PVE)  
Coursera has confirmed the identity of this individual and their participation in the course.



THE UNIVERSITY OF  
MELBOURNE

Oct 26, 2020

**SARANG WASUDEO GIRADKAR**

has successfully completed

**The Language and Tools of Financial Analysis**

an online non-credit course authorized by The University of Melbourne and offered through Coursera



Dean Faculty of Business and Economics  
Sidney Myer Chair of Commerce

Associate Professor  
Faculty of Business and Economics

Verify at [coursera.org/verify/XCT98BEYWFQ6](https://coursera.org/verify/XCT98BEYWFQ6)  
Coursera has confirmed the identity of this individual and their participation in the course.

This certificate does not confer credit towards a degree, nor student status, at the issuing University.

UC DAVIS

COURSE  
CERTIFICATE

Jan 13, 2021

Ritika Sandeep Toshniwal

has successfully completed

Managing as a Coach

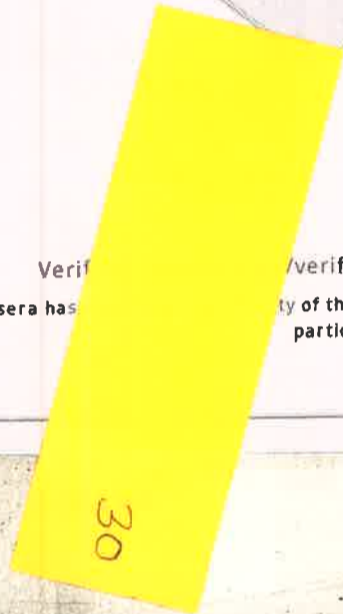
an online non-credit course authorized by University of California, Davis and offered through Coursera



A handwritten signature in black ink, appearing to read 'Kris Plachy'.

Kris Plachy  
CEO and Founder & Instructor, Leadership Coach, LLC  
UC Davis Division of Continuing and Professional Education

Verify [/verify/A9KRYN72HBR3](#)  
Coursera has verified the identity of this individual and their participation in the course.



30



COURSE  
CERTIFICATE

Nov 5, 2020

**Pradnya Prakash Sawal**

has successfully completed

**AI For Everyone**

an online non-credit course authorized by DeepLearning.AI and offered through Coursera



A handwritten signature in cursive script, reading "Andrew Ng".

Adjunct Professor Andrew Ng  
Computer Science Department  
Stanford University

Verify at [coursera.org/verify/339CVHZIP4V9D](https://coursera.org/verify/339CVHZIP4V9D)  
Coursera has confirmed the identity of this individual and their  
participation in the course.

31

# M UNIVERSITY OF MICHIGAN

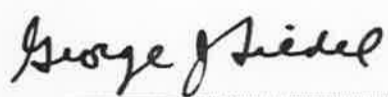
Nov 30, 2020

## Pradnya Prakash Sawal

has successfully completed

### Successful Negotiation: Essential Strategies and Skills

an online non-credit course authorized by University of Michigan and offered through Coursera



George Siedel  
Williamson Family Professor of Business Administration  
Thurnau Professor of Business Law  
University of Michigan

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/FXHY7D5K96M6](https://coursera.org/verify/FXHY7D5K96M6)  
Coursera has confirmed the identity of this individual and their participation in the course.



COURSE  
CERTIFICATE

May 2, 2021

**Mohammad Rehan Khan**

has successfully completed

**Using Databases with Python**

an online non-credit course authorized by University of Michigan and offered through  
Coursera



A handwritten signature in cursive script, appearing to read 'Charles', followed by a horizontal line.

Charles Severance  
Clinical Professor, School of Information  
University of Michigan

Verify at [coursera.org/verify/CKC9EBWUAPCF](https://coursera.org/verify/CKC9EBWUAPCF)  
Coursera has confirmed the identity of this individual and their  
participation in the course.



# **M** UNIVERSITY OF MICHIGAN

May 16, 2021

## Mohammad Rehan Khan

has successfully completed

### Capstone: Retrieving, Processing, and Visualizing Data with Python

an online non-credit course authorized by University of Michigan and offered through Coursera



Charles Severance  
Clinical Professor, School of Information  
University of Michigan

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/A3NQ3H9ZAVZN](https://coursera.org/verify/A3NQ3H9ZAVZN)

Coursera has confirmed the identity of this individual and their participation in the course.

# **M** UNIVERSITY OF MICHIGAN

23-Nov-2020

**AVANI PAREKH**

has successfully completed

Programming for Everybody (Getting Started with Python)

an online non-credit course authorized by University of Michigan and offered through Coursera

COURSE  
CERTIFICATE



A handwritten signature in cursive script, appearing to read "Charles", followed by a horizontal line.

Charles Severance  
Clinical Professor, School of Information  
University of Michigan

This certificate is a record of the University of Michigan's recognition of this individual and their participation in the course.

**coursera**  
Project  
Network

Jan 9, 2021

**Pratik Jadhav**

has successfully completed

**Create a Budget with Google Sheets**

an online non-credit course authorized by Coursera Project Network and offered through Coursera

*Jamie Schroeder*

Jamie Schroeder  
Subject Matter Expert  
Freedom Learning Group

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/NUMZU9ZHJ8J5](https://coursera.org/verify/NUMZU9ZHJ8J5)  
Coursera has confirmed the identity of this individual and their participation in the course.



# ONLINE

Aug 9, 2020

## Shreya Vij

has successfully completed

### People Analytics

an online non-credit course authorized by University of Pennsylvania and offered through Coursera

COURSE  
CERTIFICATE



Cade Massey | Martine Haas | Matthew Bidwell  
Practice Professor | Associate Professor of Management | Associate Professor of Management  
The Wharton School, University of Pennsylvania

Verify at [coursera.org/verify/J94MWWQ6E5N2](https://coursera.org/verify/J94MWWQ6E5N2)

Coursera has confirmed the identity of this individual and their participation in the course.

The online course named in this certificate may draw on material from courses taught on-campus, but it is not equivalent to an on-campus course. Participation in this online course does not constitute enrollment at the University of Pennsylvania. This certificate does not confer a University grade, course credit or degree, and it does not verify the identity of the learner.

**UC DAVIS**

**COURSE  
CERTIFICATE**

Nov 18, 2020

**Shreya Vij**

has successfully completed

**Managing as a Coach**

an online non-credit course authorized by University of California, Davis and offered through Coursera



A handwritten signature in black ink, appearing to read "Kris Plachy".

Kris Plachy  
CEO and Founder & Instructor, Leadership Coach, LLC  
UC Davis Division of Continuing and Professional Education

Verify at [coursera.org/verify/YBEC33V7JPN](https://coursera.org/verify/YBEC33V7JPN)  
Coursera has confirmed the identity of this individual and their participation in the course.



# ONLINE

Aug 25, 2020

## Shreya Vij

has successfully completed

### Customer Analytics

an online non-credit course authorized by University of Pennsylvania and offered through Coursera

COURSE  
CERTIFICATE



*Eric T. Bradlow Peter Fader Raghuram Iyengar Ron Berman*

Eric Bradlow, Peter Fader, Raghuram Iyengar, and Ron Berman  
The Wharton School

Verify at [coursera.org/verify/QQJA4DL33YQL](https://coursera.org/verify/QQJA4DL33YQL)

Coursera has confirmed the identity of this individual and their participation in the course.

The online course named in this certificate may draw on material from courses taught on-campus, but it is not equivalent to an on-campus course. Participation in this online course does not constitute enrollment at the University of Pennsylvania. This certificate does not confer a University grade, course credit or degree, and it does not verify the identity of the learner.





COURSE  
CERTIFICATE

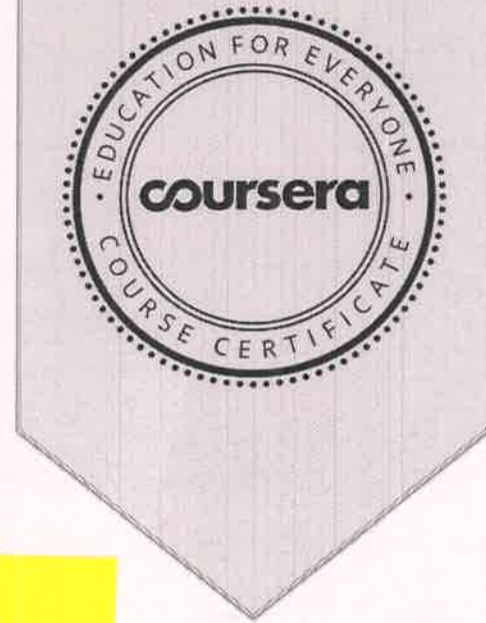
Oct 9, 2020

Supriya Tukaram Sawant

has successfully completed

AI For Everyone

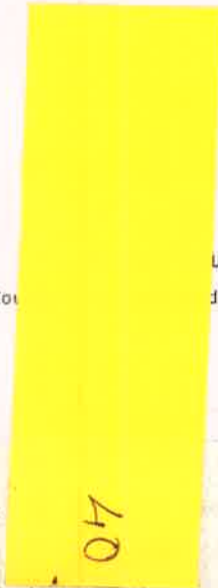
an online non-credit course authorized by DeepLearning.AI and offered through Coursera



Adjunct Professor Andrew Ng  
Computer Science Department  
Stanford University

[coursera.org/verify/UXX9PB7R8MJK](https://coursera.org/verify/UXX9PB7R8MJK)

Course ID and the identity of this individual and their participation in the course.



40



**MACQUARIE**  
**University**  
SYDNEY · AUSTRALIA

Oct 18, 2020

**Supriya Tukaram Sawant**

has successfully completed

**Marketing analytics: Know your customers**

an online non-credit course authorized by Macquarie University and offered through  
Coursera

*R Welling*

Ray Welling, PhD  
Adjunct Faculty  
Department of Marketing  
Macquarie Business School  
Sydney, Australia

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/WY4H5RZ5NSQS](https://coursera.org/verify/WY4H5RZ5NSQS)

Coursera has confirmed the identity of this individual and their  
participation in the course.

(41)



**MACQUARIE**  
University  
SYDNEY • AUSTRALIA

Oct 30, 2020

**Supriya Tukaram Sawant**

has successfully completed

**Excel Skills for Business: Essentials**

an online non-credit course authorized by Macquarie University and offered through  
Coursera

Nicky Bull, Dr Prashan S. M. Karunaratne, FHEA, A/Professor Yvonne Breyer

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/ADV5MTLL34Q7](https://coursera.org/verify/ADV5MTLL34Q7)

Coursera has confirmed the identity of this individual and their  
participation in the course.

42



Oct 24, 2020

**Supriya Tukaram Sawant**

has successfully completed

**Effective Sales – An Overview**

an online non-credit course authorized by Fundação Instituto de Administração and offered through Coursera

Nelson Yoshida, Samantha Mazzero, Cesar Rodrigues and Edson Ito

**COURSE  
CERTIFICATE**



Verify at [coursera.org/verify/HB3HRX8B4MCG](https://coursera.org/verify/HB3HRX8B4MCG)  
Coursera has confirmed the identity of this individual and their participation in the course.

42



Oct 23, 2020

Tapasya Anil Nerurkar

has successfully completed

Stock Valuation with Comparable Companies Analysis

an online non-credit course authorized by Coursera Project Network and offered through Coursera

Bekiruzbel Ochilov, ACSI  
Investment Analyst

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/K3L3A8GLRFU](https://coursera.org/verify/K3L3A8GLRFU)

Coursera has confirmed the identity of this individual and their participation in the course.

44



# ISB

Oct 25, 2020

## Tapasya Anil Nerurkar

has successfully completed

### Introduction to Financial Markets

an online non-credit course authorized by Indian School of Business and offered through  
Coursera

Vaidya Nathan  
Faculty Director-PGP Finance & ISB Alumni Endowment Research Fellow  
Finance

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/ZQ4VJRE4TBRR](https://coursera.org/verify/ZQ4VJRE4TBRR)

Coursera has confirmed the identity of this individual and their participation in the course.

45



# Yale

Nov 22, 2020

## DHWANI M PRABHAWALKAR

has successfully completed with honors

### Financial Markets

an online non-credit course authorized by Yale University and offered through Coursera



Robert J. Shiller  
Sterling Professor of Economics  
Yale University

## COURSE CERTIFICATE

WITH HONORS



Verify at [coursera.org/verify/D9LXYQXYGSF](https://coursera.org/verify/D9LXYQXYGSF)  
Coursera has confirmed the identity of this individual and their participation in the course.

46

Nov 26, 2020

**DHWANI M PRABHAWALKAR**

has successfully completed

**FinTech and the Transformation in Financial  
Services**

an online non-credit course authorized by Copenhagen Business School and offered  
through Coursera



Jonas Hedman  
Associate Professor  
Department of Digitalization, Copenhagen Business School

Stefan Henningsson  
Associate Professor  
Department of Digitalization

Verify at [coursera.org/verify/GD3S39XEF5HN](https://coursera.org/verify/GD3S39XEF5HN)  
Coursera has confirmed the identity of this individual and their  
participation in the course.



Nov 27, 2020

**DHWANI M PRABHAWALKAR**

has successfully completed

**Stock Valuation with Comparable Companies Analysis**

an online non-credit course authorized by Coursera Project Network and offered through Coursera

Bekhruzбек Ochilov, ACSF  
Investment Analyst

**COURSE  
CERTIFICATE**



Verify at [coursera.org/verify/GARADUERTYWP](https://coursera.org/verify/GARADUERTYWP)  
Coursera has confirmed the identity of this individual and their participation in the course.

**Imperial College  
London**

Nov 28, 2020

**Javed Abdul Rauf Shaikh**

has successfully completed

**Creative Thinking: Techniques and Tools for  
Success**

an online non-credit course authorized by Imperial College London and offered through  
Coursera



Peter Childs  
Head of the Dyson School of Design Engineering  
Dyson School of Design Engineering

**COURSE  
CERTIFICATE**



Verify at [coursera.org/verify/7MMG4P8TQAAR](https://coursera.org/verify/7MMG4P8TQAAR)  
Coursera has confirmed the identity of this individual and their  
participation in the course.

# Yale

Nov 20, 2020

## Javed Abdul Rauf Shaikh

has successfully completed with honors

### Financial Markets

an online non-credit course authorized by Yale University and offered through Coursera



Robert J. Shiller  
Sterling Professor of Economics  
Yale University

COURSE  
CERTIFICATE

WITH HONORS



Verify at [coursera.org/verify/5BXV3NLVJS73](https://coursera.org/verify/5BXV3NLVJS73)

Coursera has confirmed the identity of this individual and their participation in the course.

50



THE HONG KONG  
UNIVERSITY OF SCIENCE  
AND TECHNOLOGY

Nov 22, 2020

**Javed Abdul Rauf Shaikh**

has successfully completed

**FinTech Foundations and Overview**

an online non-credit course authorized by The Hong Kong University of Science and Technology and offered through Coursera

*Theodore Henry King Clark*

Prof. Theodore Henry King CLARK  
Associate Professor of Information Systems, Business Statistics  
and Operations Management Department  
Hong Kong University of Science and Technology

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/9WG5TZU9VP8A](https://coursera.org/verify/9WG5TZU9VP8A)  
Coursera has confirmed the identity of this individual and their participation in the course.

51





Nov 29, 2020

**Javed Abdul Rauf Shaikh**

has successfully completed

**Introduction to Personal Branding**

an online non-credit course authorized by University of Virginia and offered through Coursera

Kimberley R. Barker, M.L.S.  
Manager for Technology Education & Computing  
Claude Moore Health Sciences Library

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/TTC79GVS7LTL](https://coursera.org/verify/TTC79GVS7LTL)  
Coursera has confirmed the identity of this individual and their participation in the course.



Nov 26, 2020

# Javed Abdul Rauf Shaikh

has successfully completed

## Stock Valuation with Comparable Companies Analysis

an online non-credit course authorized by Coursera Project Network and offered through Coursera

Bekl:ruzbek Ochilov, ACSI  
Investment Analyst

### COURSE CERTIFICATE



Verify at [coursera.org/verify/RXEYVRS75QE](https://coursera.org/verify/RXEYVRS75QE)  
Coursera has confirmed the identity of this individual and their participation in the course.



Nov 26, 2020

# Javed Abdul Rauf Shaikh

has successfully completed

## Stock Valuation with Dividend Discount Model

an online non-credit course authorized by Coursera Project Network and offered through Coursera

Bekhruzбек Ochilov, ACSI  
Investment Analyst

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/GNRNS8T8FA6T](https://coursera.org/verify/GNRNS8T8FA6T)  
Coursera has confirmed the identity of this individual and their participation in the course.

54

# UCI Division of Continuing Education

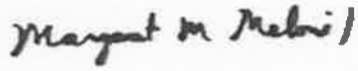
Nov 28, 2020

## Javed Abdul Rauf Shaikh

has successfully completed

### Work Smarter, Not Harder: Time Management for Personal & Professional Productivity

an online non-credit course authorized by University of California, Irvine and offered through Coursera



Margaret Meloni, MBA, PMP  
Instructor  
University of California, Irvine Division of Continuing Education

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/9RA3PXUMGYSP](https://coursera.org/verify/9RA3PXUMGYSP)  
Coursera has confirmed the identity of this individual and their participation in the course.

55

# **M** UNIVERSITY OF MICHIGAN

May 3, 2021

## ASHISH SHARMA

has successfully completed

### Programming for Everybody (Getting Started with Python)

an online non-credit course authorized by University of Michigan and offered through Coursera



Charles Severance  
Clinical Professor, School of Information  
University of Michigan

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/QL2YM9LYGE66](https://coursera.org/verify/QL2YM9LYGE66)

Coursera has confirmed the identity of this individual and their participation in the course.



DARDEN SCHOOL  
of BUSINESS

COURSE  
CERTIFICATE

Oct 11, 2020

**ANGIKA ROY**

has successfully completed

**Marketing Analytics**

an online non-credit course authorized by University of Virginia and offered through  
Coursera



*R. Venkatesan*

Rajkumar Venkatesan  
Ronald Trzcinski Professor of Business Administration  
Darden School of Business  
University of Virginia

Verify at [coursera.org/verify/FVCDXGNDKUWH](https://coursera.org/verify/FVCDXGNDKUWH)  
Coursera has confirmed the identity of this individual and their  
participation in the course.

57





Nov 9, 2020

**ANGIKA ROY**

has successfully completed

**Programming for Everybody (Getting Started with Python)**

an online non-credit course authorized by University of Michigan and offered through Coursera

A handwritten signature in black ink, appearing to read 'Charles', followed by a horizontal line.

Charles Severance  
Clinical Professor, School of Information  
University of Michigan

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/TXYGBVZ7YGDE](https://coursera.org/verify/TXYGBVZ7YGDE)  
Coursera has confirmed the identity of this individual and their participation in the course.



Oct 20, 2020

**ANGIKA ROY**

has successfully completed

**AI For Everyone**

an online non-credit course authorized by DeepLearning.AI and offered through Coursera

A handwritten signature in cursive script that reads "Andrew Ng".

Adjunct Professor Andrew Ng  
Computer Science Department  
Stanford University

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/QD9HMKELD8J](https://coursera.org/verify/QD9HMKELD8J)  
Coursera has confirmed the identity of this individual and their  
participation in the course.

59



# ISB

Nov 25, 2020

## ADITI SANJAY MALPANI

has successfully completed

### Introduction to Financial Markets

an online non-credit course authorized by Indian School of Business and offered through Coursera

Vaidya Nathan  
Faculty Director- PGP Finance & ISB Alumni Endowment Research Fellow  
Finance

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/7A7KJZ9H2QJY](https://coursera.org/verify/7A7KJZ9H2QJY)  
Coursera has confirmed the identity of this individual and their participation in the course.

60

60



COURSE CERTIFICATE

Nov 13, 2020

Shreya Ghosh

has successfully completed

FinTech and the Transformation in Financial Services

an online non-credit course authorized by Copenhagen Business School and offered through Coursera



Handwritten signature of Stefan Hestingsen

Jens Hedman  
Associate Professor  
Department of Digitalization, Copenhagen Business School

Stefan Hestingsen  
Associate Professor  
Department of Digitalization

Verify at [coursera.org/verify/P7RE7T55CVDX](https://coursera.org/verify/P7RE7T55CVDX)  
Coursera has confirmed the identity of this individual and their participation in the course.



DARDEN SCHOOL  
of BUSINESS

COURSE  
CERTIFICATE

Jan 20, 2021

**RICHA RAVINDRA WARANG**

has successfully completed

**Foundations of Business Strategy**

an online non-credit course authorized by University of Virginia and offered through  
Coursera



Michael J. Lenox  
Senior Associate Dean and Chief Strategy Officer  
Darden School of Business  
University of Virginia

Jared D. Harris  
Samuel L. Slover Research Chair in Business Administration  
Darden School of Business  
University of Virginia

Verify at [coursera.org/verify/TB65BZ63Y8QJ](https://coursera.org/verify/TB65BZ63Y8QJ)  
Coursera has confirmed the identity of this individual and their  
participation in the course.

Nov 20, 2020

**RICHA RAVINDRA WARANG**

has successfully completed

**FinTech and the Transformation in Financial  
Services**

an online non-credit course authorized by Copenhagen Business School and offered  
through Coursera



*[Signature]*

*[Signature]*

Jonas Hedman  
Associate Professor  
Department of Digitalization, Copenhagen Business School

Stefan Henningsson  
Associate Professor  
Department of Digitalization

Verify at [coursera.org/verify/NLMU5XZLP5EE](https://coursera.org/verify/NLMU5XZLP5EE)  
Coursera has confirmed the identity of this individual and their  
participation in the course.





UC San Diego

COURSE  
CERTIFICATE

Nov 25, 2020

**RICHA RAVINDRA WARANG**

has successfully completed

**Learning How to Learn: Powerful mental tools to help you master tough subjects**

an online non-credit course authorized by McMaster University, University of California San Diego and offered through Coursera



*Barbara L. Oakley*     *Terry Sejnowski*

Barb Oakley  
Terry Sejnowski

Verify at [coursera.org/verify/MRUGSEJNRGUY](https://coursera.org/verify/MRUGSEJNRGUY)  
Coursera has confirmed the identity of this individual and their participation in the course.

64

Nov 7, 2020

**PRATIK CHANDRASHEKHAR  
GIRI**


has successfully completed

**FinTech and the Transformation in Financial  
Services**

an online non-credit course authorized by Copenhagen Business School and offered  
through Coursera



  
Jonas Hedman  
Associate Professor  
Department of Digitalization, Copenhagen Business School

  
Stefan Henningsson  
Associate Professor  
Department of Digitalization

Verify at [coursera.org/verify/FF2NH8GG7NFU](https://coursera.org/verify/FF2NH8GG7NFU)  
Coursera has confirmed the identity of this individual and their  
participation in the course.



Nov 16, 2020

# PRATIK CHANDRASHEKHAR GIRI

has successfully completed

## The Language and Tools of Financial Analysis

an online non-credit course authorized by The University of Melbourne and offered through Coursera



Dean Faculty of Business and Economics  
Sidney Myer Chair of Commerce

Associate Professor  
Faculty of Business and Economics

Verify at [coursera.org/verify/LDZ6V6KGXT77](https://coursera.org/verify/LDZ6V6KGXT77)  
Coursera has confirmed the identity of this individual and their participation in the course.

This certificate does not confer credit towards a degree, nor student status, at the issuing University.



Nov 20, 2020

# Meet Kirit Shah

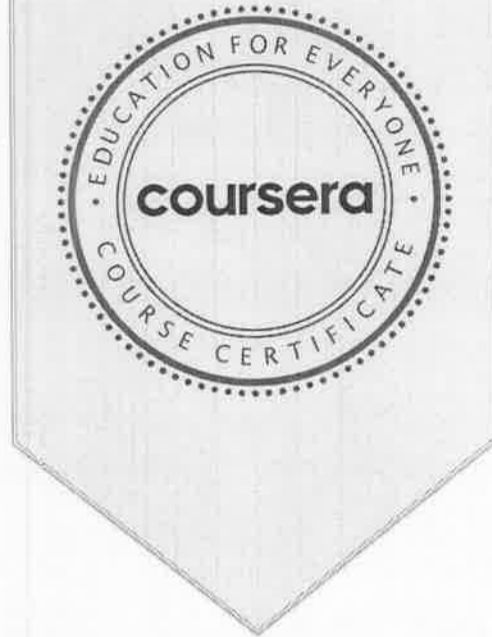
has successfully completed

## Analyzing Company Performance using Ratios

an online non-credit course authorized by Coursera Project Network and offered through Coursera

Bekhruzbek Ochilov, ACSI  
Investment Analyst

### COURSE CERTIFICATE



Verify at [coursera.org/verify/3YFHHQKTLCMX](https://coursera.org/verify/3YFHHQKTLCMX)  
Coursera has confirmed the identity of this individual and their participation in the course.



Nov 26, 2020

## Meet Kirit Shah

has successfully completed

### Investment Strategy

an online non-credit course authorized by Indian School of Business and offered through Coursera

Vikram Kuriyan  
Clinical Professor of Finance  
Director, Investment Lab  
Indian School of Business

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/3YJBU4XJ5E4J](https://coursera.org/verify/3YJBU4XJ5E4J)  
Coursera has confirmed the identity of this individual and their participation in the course.

68



Nov 21, 2020

# Meet Kirit Shah

has successfully completed

## Investment Risk Management

an online non-credit course authorized by Coursera Project Network and offered through Coursera

Bekhruzbek Ochilov, ACSI  
Investment Analyst

### COURSE CERTIFICATE



Verify at [coursera.org/verify/JSACRQD3PZQ8](https://coursera.org/verify/JSACRQD3PZQ8)  
Coursera has confirmed the identity of this individual and their participation in the course.



**Duke**  
UNIVERSITY

Nov 27, 2020

**Meet Kirit Shah**

has successfully completed

**Behavioral Finance**

an online non-credit course authorized by Duke University and offered through Coursera

COURSE  
CERTIFICATE



*Erma Rasel*

Erma Rasel  
Associate Chair and Professor  
Economics

Verify at [coursera.org/verify/MA4HN4DZHCNZ](https://coursera.org/verify/MA4HN4DZHCNZ)  
Coursera has confirmed the identity of this individual and their  
participation in the course.

70

7



**MACQUARIE**  
University  
SYDNEY · AUSTRALIA

Nov 24, 2020

**DEVIKA PANKAJ GHOSH**

has successfully completed

**Excel Skills for Business: Essentials**

an online non-credit course authorized by Macquarie University and offered through  
Coursera

COURSE  
CERTIFICATE



Nicky Bull, Lecturer and Lead Content Designer  
Dr Prashan S. M. Karunaratne, Lecturer - Teaching & Leadership | Department of Actuarial Studies & Business Analytics  
A/Professor Yvonne Breyer, Director, Learning & Teaching | Head, Learning Futures

Verify at [coursera.org/verify/KPEHAUU9NAEZ](https://coursera.org/verify/KPEHAUU9NAEZ)  
Coursera has confirmed the identity of this individual and their  
participation in the course.

71

# **M** UNIVERSITY OF MICHIGAN

Nov 29, 2020

**DEVIKA PANKAJ GHOSH**

has successfully completed

**Programming for Everybody (Getting Started with Python)**

an online non-credit course authorized by University of Michigan and offered through Coursera



Charles Severance  
Clinical Professor, School of Information  
University of Michigan

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/WKNLBXJ24C36](https://coursera.org/verify/WKNLBXJ24C36)  
Coursera has confirmed the identity of this individual and their participation in the course.

72

UCDAVIS

Nov 22, 2020

Arti Devdas Jani

has successfully completed

Managing as a Coach

an online non-credit course authorized by University of California, Davis and offered through Coursera



Kris Plachy  
CEO and Founder & Instructor, Leadership Coach, LLC  
UC Davis Division of Continuing and Professional Education

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/M3Q2YTUWW4WF](https://coursera.org/verify/M3Q2YTUWW4WF)  
Coursera has confirmed the identity of this individual and their participation in the course.

73



Nov 21, 2020

**Arti Devdas Jani**

has successfully completed

**Diversity and inclusion in the workplace**

an online non-credit course authorized by ESSEC Business School and offered through Coursera

Junko Takagi  
Teaching Professor  
Management Department, Chair of Leadership & Diversity

COURSE  
CERTIFICATE



Verify at [coursera.org/verify/7JE39UQTHY8](https://coursera.org/verify/7JE39UQTHY8)  
Coursera has confirmed the identity of this individual and their participation in the course.

74



Jun 23, 2021

**Abrar Khan Jahangir Khan**

has successfully completed

**Trading Algorithms**

an online non-credit course authorized by Indian School of Business and offered through Coursera

COURSE  
CERTIFICATE



Prasanna Tantri  
Assistant Professor of Finance  
Executive Director, Center for Analytical Finance  
Indian School of Business

Verify at [coursera.org/verify/VZZPAN9M2SM6](https://coursera.org/verify/VZZPAN9M2SM6)  
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The following mentioned value-added programs include assignments/project modules along with instructional hours. Assignments were taken into consideration while approving the program completion certificate/status.

| Sr.No | Program Title  | Instructional Hours | Assignment/projects modules hours | Total Hours |
|-------|--|---------------------|-----------------------------------|-------------|
| 1     | Executive Coaching (AY 2018-19)  | 18                  | 15                                | 33          |
| 2     | Certificate program in Investment Banking (AY2018-19)  | 25                  | 8                                 | 33          |
| 3     | Talent Acquisition Training (AY2019-2020)  | 18                  | 12                                | 30          |
| 4     | Storytelling with Data (AY2019-202)  | 20                  | 12                                | 32          |
| 5     | Certification Program: Category III AIFs and Portfolio Management Services - Hedge Funds (AY2020-2021) | 25                  | 10                                | 35          |
| 6     | Certification Program: Category I AIFs and Category II AIFs - Private Equity (AY2020-2021)             | 25                  | 10                                | 35          |
| 7     | NLP Foundation Course Dale Carnegie Training (Competency Modelling) (AY2021-22)                        | 22                  | 8                                 | 30          |



Head of Accreditation

*Vaishali Kulkarni*  
Prof. (Dr.) Vaishali Kulkarni.