## 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
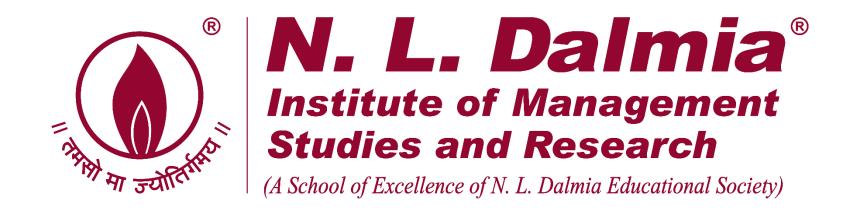
BY

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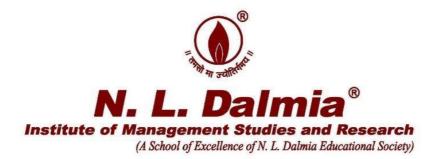*(A School of Excellence of N. L. Dalmia Educational Society)*

## N. L. DALMIA INSTITUTE OF MANAGEMENT STUDIES AND RESEARCH
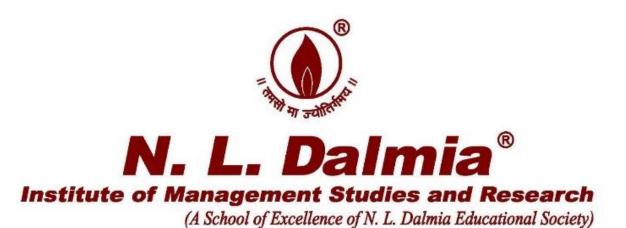
FOR

**NAAC ACCREDITATION SECOND CYCLE 2022**

# Number of value-added courses for imparting transferable and life skills offered during A.Y.2018-19

# Supporting Documents

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

| Sr. No. | Details |
|---------|---------|
| | **Number of value-added courses for imparting transferable and life skills offered during A.Y.2018-19** |
| 1 | Program on Equity Research and Valuation |
| 2 | Certificate Program in Technical Analysis |
| 3 | Executive Coaching |
| 4 | Bloomberg Market Concepts |
| 5 | MarkStat |
| 6 | Bloomberg Training<br>(a) Bloomberg Market Concepts (BMC) Certificate<br>(b) Bloomberg Analyst Certificate |
| 7 | Certificate program in Investment Banking |

# A.Y.2018-19
# Certificate Program on Equity Research and Valuation

**Report on Value Added Course**

**Title of the course-** "Equity Research and Valuation"

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

**Dates-** 13ᵗʰ January 2019 to 10ᵗʰ March 2019

**Duration of the course -30 hours**

**Timings –** 13ᵗʰ January 2019,20ᵗʰ January 2019, 3ʳᵈ February 2019,10ᵗʰ February 2019,10ᵗʰ March 2019 (All Sundays 10am to 5pm)

**Resource Persons**

**Mr. Vinit Bollinjkar, Head of Equities, Ventura Securities**

**Brief Description-**

There was 30 hour value added program conducted by Mr. Vinit Bollinjkar between 13ᵗʰ January 2019 to 10ᵗʰ March 2019 on Equity Research and Valuation with topics such as Introduction to Valuations, Approaches to Valuation, Understanding Financial Statements, Basics of risk, Estimating Risk Parameters, Calculating Earnings and Cash Flows, Earnings Growth, Estimating terminal value, various discounted cash flow models, relative valuation, Valuing financial firms, startups, intangibles etc. Topics such as Behavioural Aspects of Finance, Analysts Approach to Markets, Analysts Approach to Markets, Fund Managers and Advisors Approach to Markets were also covered. It was competed by all the 49 students who had enrolled for the course.
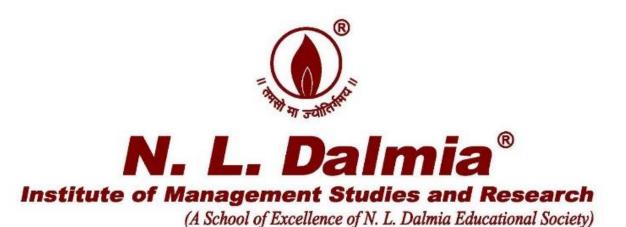
# Comprehensive course on Equity Research and Investment Valuations

1) Introduction to Valuation
    a. Philosophical basis of Valuation
    b. Role of Valuation
2) Approaches to Valuation
    a. DCF
    b. Relative valuation
    c. Contingent Claim Valuation
3) Understanding Financial Statements
    a. Basic Accounting
    b. How to read Balance Sheet
    c. How to read P/L
    d. How to read cash flows
    e. Analyzing Financial Statements
    f. Forensic Accounting methods
    g. Case studies
4) Basics of risk
    a. What is Risk
    b. Equity risk and Expected Returns
    c. Riskless rates and Risk premiums
    d. Case studies
5) Estimating Risk Parameters
    a. Cost of Equity
    b. Cost of Capital
    c. Case studies
6) Calculating Earnings and Cash Flows
    a. Adjusting earnings
    b. Tax Effects
    c. Reinvestments
    d. Case Studies
7) Earnings Growth
    a. Importance of Earning Growth
    b. Historical Growth
    c. Estimates of Growth
    d. Determinants of Growth
    e. Qualitative Aspects of Growth
    f. Case Studies
8) Estimating terminal value
9) Models
    a. DDM
    b. FCFE
    c. FCFF – Cost of Capital Approach
    d. FCFF – APV Approach
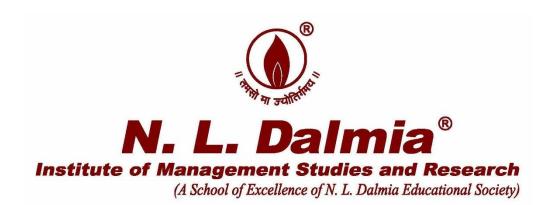    e. Effects of Leverage on Firm

      f.   APV and Financial Leverage

      g.   Case Studies

10) Relative valuation

      a.   Use of Relative Valuation

      b.   Basic steps to using Multiples

      c.   Reconciling Relative and DCF Valuations

      d.   PE Ratio-

      e.   PEG Ratio

      f.   PBV

      g.   Revenue multiples

      h.   Ebitda multiples

      i.   Other sector specific multiples

      j.   Case Studies

11) Valuing Financial Firms

      a.   Case Studies

12) Valuing Firms with negative earnings

      a.   Case Studies

13) Valuing Startups

      a.   Case Studies

14) Valuing Private firms

      a.   Case Studies

15) Takeover and M&A Valuation

      a.   Case Studies

16) Valuing Real Estate

      a.   Case Studies

17) Valuing Intangibles

      a.   Case Studies

18) Valuing various Options in Business

      a.   Case Studies

19) Valuing Distressed Firms

      a.   Case Studies

20) Value Enhancements

      a.   EVA

      b.   CFROI

      c.   Case Studies

21) Choices on Valuation Models

      a.   Which Model, which approach?

      b.   Case Studies

22) Behavioural Aspects of Finance

      a.   Biases and Heuristics

      b.   Mental Models

23) Analysts Approach to Markets

24) Fund Managers Approach to Markets

25) Advisors Approach to Markets

      26) Investors Approach to Markets

# A.Y.2018-19
# Certificate Program in Technical Analysis

**Report on Value Added Course**

**Title of the course-** "Technical Analysis"

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

**Dates-** 12th May 2019 to 2nd June 2019

**Duration of the Course -28 to 30 hours**

**Timings -** 12th May 2019, 19th May 2019,26th May 2019 and 2nd June 2019 (All Saturdays 10am to 5pm)

**Resource Person- Mr. Vishal Dalvi, Founder & CEO, Waves Advisory**

**Brief Description-**

There was 30 hour value added program conducted by Mr. Vishal Dalvi (Aluminous of NLDIMSR) between 12th May 2019 to 2nd June 2019 on technical analysis with topics such as Dow theory, Classical price patterns, Candle sticks patterns, Momentum indicators, Elliot wave Principle, Fibonacci Retracements and Projections, Practical application and forecasting on Index Nifty/ Sensex various stocks and Designing an Algorithm Trading System using Technical Analysis. It was competed by all the 28 students who had enrolled for the course.

# Course Structure of Technical Analysis program

## By Vishal Dalvi

### at

# N. L. Dalmia Institute Of Management Studies And Research

| Days | Particulars |
|---|---|
| Day 1 | **Introduction to Technical Analysis**<br>- Why Technical Analysis?<br>- Fundamental Analysis vs Technical Analysis<br>- Types of charts<br>**Dow theory**<br>**Classical price patterns**<br>- Rectangle, Head & Shoulder, Double triple tops and bottoms, triangles, Flags, Rounding bottom,<br>Cup and Handle, Island reversals<br>- Application and Trading/Investing using Price patterns |
| Day 2 | **Candle sticks patterns**<br>**Momentum indicators**<br>- (RSI, MACD, ADX, Bollinger, Stochastic and many more).<br>- Moving averages and its variations<br>**Trend lines & channels** |
| Day 3 | **Elliot wave Principle**<br>**Fibonacci Retracements and Projections**<br>**Introduction to Harmonic Trading Patterns**<br>**Practical application and forecasting on Index Nifty/ sensex various stocks** |
| Day 4 | **Designing an Algorithm Trading System using Technical Analysis** |

2018-19

## Technical Analysis Program in May-June

**Vishal Dalvi** <vishaldalvi@wavesresearch.com>

Thu 5/2/2019 11:10 AM

**To:** ANIL GOR <goranil@yahoo.co.in> GOR <goranil@yahoo.co.in>; Anil Gor <agor@nldalmia.in>; Anil Gor <anil.gor@nldalmia.edu.in>

**Dear Sir,**

**We will start the Technical Analysis program from 12th May 2019.**
**Below is the schedule with topics we will be covering.**

**We will have sessions on 12th May, 18th May, 26th May, 2nd June**

**Day 1**
**Introduction to Technical Analysis**
 - Why Technical Analysis?
 - Fundamental Analysis vs Technical Analysis
 - Types of charts

**Dow theory**

**Classical price patterns**
 - Rectangle, Head & Shoulder, Double triple tops and bottoms, triangles, Flags, Rounding bottom,
Cup and Handle, Island reversals
 - Application and Trading/Investing using Price patterns

**Day 2**
 **Candlesticks patterns**
**Momentum indicators**
 - (RSI, MACD, ADX, Bollinger, Stochastic and many more).
 - Moving averages and its variations
**Trend lines & channels**

**Day 3**
**Elliot wave Principle**
**Fibonacci Retracements and Projections**
**Introduction to Harmonic Trading Patterns**
**Practical application and forecasting on Index Nifty/ sensex various stocks**

**Day 4**
**Designing an Algorithm Trading System using Technical Analysis**

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*Best regards,*
*Vishal Dalvi*

# Technical Analysis Program in May-June

## Vishal Dalvi <vishaldalvi@wavesresearch.com>

Thu 5/2/2019 11:10 AM

**To:** ANIL GOR <goranil@yahoo.co.in> GOR <goranil@yahoo.co.in>; Anil Gor <agor@nldalmia.in>; Anil Gor <anil.gor@nldalmia.edu.in>

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**Momentum indicators**
 - (RSI, MACD, ADX, Bollinger, Stochastic and many more).
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**Day 3**
**Elliot wave Principle**
**Fibonacci Retracements and Projections**
**Introduction to Harmonic Trading Patterns**
**Practical application and forecasting on Index Nifty/ sensex various stocks**

**Day 4**
**Designing an Algorithm Trading System using Technical Analysis**

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*Best regards,*
*Vishal Dalvi*

# A.Y. 2017-18
# Executive Coaching

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ISO 9001 : 2015
GRADE "A" ACCREDITED - NAAC

## Post Graduate Diploma in Management (PGDM)

### Guest Session

### AY 2018-19

| | |
|---|---|
| **Date** | 8-08-2018 |
| **Specialization** | Human Resource |
| **Topic** | Executive Coaching |
| **Place** | N. L. Dalmia Institute of Management Studies and Research<br><br>University in Mumbai, Maharashtra |
| **Name of the Guest** | Mudit Yadav |
| **Designation** | founder of MY Success Coaching, TedX Speaker |
| **Name of the Organisation** | MY Success Coaching |
| **Invited By** | Expert Talk – Students |

**Mr. Yadav** is a founder of MY Success Coaching and also a Co-Founder at E3 Academia of life skills. He is a motivational speaker and a success coach. He coaches executives, professionals, entrepreneurs and students to help them establish clear goals, how to function at peak potential, enhance their leadership skills, empower them to come out of cycles of depression and achieve higher levels of success.

The session mainly focused on **"Executive Coaching"** and his experience as a success coach. It started with the effectiveness of a question in starting a conversation and its relation with coaching.

The session was full of experiences shared by the guest, faculty and students. A few cases with role plays were discussed. The session ended with a guidance to take coaching as a career option which was then followed by questions from the students.

The session was very inspirational and helpful for the students who are soon going to step into the corporate world.

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

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# A.Y. 2017-18
# Bloomberg Market Concepts

# Course Plan

| Program | PGDM (Finance) |
|---|---|
| **Course Title** | Bloomberg |
| **Course Credit** | NA |
| **Academic Year** | 2018-19 |
| **Batch** | 2018-20 |
| **Semester** | I & II |
| **Duration (Hrs)** | 90 |
| **Name of the Faculty** | Prof. Prakash Rathod |
| **HOD** | Dr. Anil Gor |

## 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 : |
|--------|------------------------------------------------------|
| CO1 | 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. |
| CO2 | 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. |
| CO3 | Analyze Portfolio and risk analytics, monitoring, characteristics, attribution, historical performance & pinpoint the sources of active risk in portfolios with fundamental risk factor Models. |
| CO4 | Get 2 Bloomberg Technical Training Certifications namely Bloomberg Market Concepts (BMC) and Bloomberg Analyst Certification |

## 3. Course Overview

| Module No. | Topic | Sessions |
|------------|-------|----------|
| 1 | **Introduction and System Navigation:**<br><br>Introduction to Bloomberg<br>Key Board navigation<br>Basic commands<br>Understand Bloomberg Terminals, History, founder, Login credentials,<br>Explain the Bloomberg Keyboard<br>The red stop keys, green action keys and yellow market sector keys help you access information quickly and easily. ACCESSING THE APPLICATION;<br>Bloomberg panels, settings, create a login name and password when logging in for the first time & instruction on working on Bloomberg terminal.<br>    1. BU – Bloomberg University<br>    2. MAG – Bloomberg Magazine<br>    3. CN – Current News<br>    4. NI – Search News for Specific Category<br>    5. TNI – Search News by Keyword<br>**Types of Functions**<br>**Non-security functions** - Non-security functions provide information or analysis on an entire market sector and do not require a loaded security.<br>**Security-specific functions** - Security-specific functions analyze a loaded security.<br>**Using Functions** - There are two main way to run functions, depending on whether or not you know the function mnemonic (a short, memorable name or code). | 1-3 |

| Module No. | Topic | Sessions |
|---|---|---|
| | | |
| | **Economic indicators:**<br><br>Discover the fundamentals of how economic indicators are published and analyzed using various Bloomberg functions.<br><br>**Illustrate various world & domestic Economic Indicators Bloomberg Commands**<br><br>1. WECO - World economic calendar<br>2. ECST - Macroeconomic parameters<br>3. EMKT -Emerging Market trends<br>4. ECOW -World eco stats<br>5. WEI – World equity Indices<br>6. World central bank portals.<br>7. ECO - Economic calendars of countries<br>8. FCON - Financial condition monitor for a country<br>9. IFMO - Inflation monitor<br>10. CENB - Central bank finder (select region -> central bank)<br>11. ECFC - Economic forecasts & indicators<br>12. ECTR - Trade flow analysis<br>13. ECSU - Economic surprise monitor<br>14. WIRP - World int rate probability<br>15. ECWB - Economic workbench | 4-13 |
| 3 | **Equities:**<br><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.<br><br>**Equity Overview & Illustrate various Equity Bloomberg Commands**<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<br>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 &amp; Estimates | 14-24 |

| Module No. | Topic | Sessions |
|---|---|---|
| | 1. GIP – Intraday Price Chart<br>2. GPO – Year to Year Price Chart<br>3. ANR – Analysts Recommendation<br>4. RV – Relative Valuation<br>5. MA – Mergers &amp; Acquisition<br>6. CNDL – Candlestick Chart<br>7. COMP – Compare two securities while viewing a graph<br>8. MOST – Most Active Securities<br>9. FUND – Mutual Fund Search<br>10. EVTS – Company Events<br>11. CN – Current News<br>12. NI – Search News for Specific Category<br>13. 23.PORT - portfolio & risk analytics<br>14. KI - Key insights<br>15. SPLC- Supply chain analysis<br>16. TMSG - Trade ideas etc. | |
| 4 | **Bloomberg Market Concepts:**<br><br>Bloomberg Technical Training Certification. | 25-32 |
| 5 | **Money Market:**<br><br>T-bills, Commercial Paper, Call money market, Commercial Bill Market, Repo and Reverse Repo.<br>function to learn more about money markets<br><br>**Money market overview & Illustrate various Equity  Bloomberg Commands**<br>   1. Treasury and money markets BTMM<br>   2. Multi-asset markets monitor<br>   3. OTC Money market program list PGM<br>   4. Money markets rates MMR<br>**Repo**<br>   1. Repo/Reverse repo analysis RRRA<br>   2. Buy/Sell back repo analysis BSR<br>   3. Bond forward price analysis FPA<br>   4. Cost of carry for a bond COC<br>   5. Cross-Currency repo calculator FE6<br>**Markets monitoring**<br>   1. World interest rates probabilities WIRP<br>   2. Implied market policy rates MIPR<br>   3. Spot/Forwards monitor FXFR<br>   4. Interest rates swaps monitor IRSB<br>   5. Forward curve matrix FWCM<br>   6. Money market new issuance NIM | 32-35 |

| Module No. | Topic | Sessions |
|---|---|---|
| | **Trading solutions & execution** | |
| | 1. Treasury console TCON | |
| | 2. Money market offerings ECPX / BOOM | |
| | 3. Electronic FX trading FXGO | |
| | 4. Tri-Party/General RPOV | |
| | 5. collateral repo ticket IB Dealing IBD | |
| | 6. Tri-Party confirmation ticket TCNF | |
| | 7. Repo confirmation RRRA | |
| | 8. Request for repo inquiries RPOQ | |
| | 9. Excel templates for money market XLPT | |
| | **Pricing & analysis** | |
| | 1. Arbitrage opportunities FXFA for deposit rates FX | |
| | 2. Forward calculator FRD | |
| | 3. Synthetic FRAs EDSF | |
| | 4. Swaps calculator SWPM | |
| | 5. Cross currency funding XCF | |
| | 6. Liquidity assessment LQA | |
| | **Additional information** | |
| | 1. Calendar for all countries CDR | |
| | 2. Days between dates DCX | |
| | 3. Money market curves MMCV | |
| | 4. Global prime rates PRIM | |
| | 5. Treasury bill auction AUCR | |
| | 6. Private money market security add DES ADD | |
| 6 | **Fixed income securities/ Bond Market:**<br><br>Deep into the world of Fixed Income, with sub modules including The Roots Of The Bond Market, Bond Valuation.<br>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.<br>**Bond market overview & Illustrate various Equity Bloomberg Commands**<br>1. WB - World bond market (select region)<br>2. SRCH -Fixed income search (ask question -> result)<br>3. GIQ - intraday market chart<br>4. BXT -Buy ticket<br>5. SXT - Sell ticket<br>6. CRPR - Credit rating profile<br>7. FIPX - Fixed income price discovery<br>8. NIM - New issue monitor<br>9. WBF - world bond futures<br>10. FICM - Fixed income credit monitor | 36-42 |

| Module No. | Topic | Sessions |
|---|---|---|
| | 11. FIRV - Fixed income relative value<br>12. FIW - Fixed income worksheet<br>13. STNI - suggested news filters<br>14. RATC - rating changes | |
| 7 | ## Currencies/FX Market:<br><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.<br><br>**FX market overview & Illustrate various Equity  Bloomberg Commands**<br><br>**NEWS & RESEARC**<br><br>1. First Word for FX FIRS<br>2. Virtual currency monitor VCCY<br>3. Key FX news NI FXKEY<br><br>**IDEA GENERATION**<br>1. FX Information Portal FXIP<br>2. Rank and compare currencies WCRS<br>3. Custom real-time FX dashboards XDSH<br>4. FX forecasts FXFC<br>5. FX probability calculator FXFM<br>6. Customize and backtest FX trade strategies FXSW<br>7. Bloomberg U.S. Dollar Index BDXY<br>8. Share and track FX ideas IDEA<br>9. Implied volatility matrix WVOL<br><br>**MARKET MONITORS & PRICING**<br><br>1. Executable based pricing BGNE<br>2. All quotes for a currency instrument ALLQ<br>3. Spot and forward fixing rates BFIX<br>4. World currency spot rates WC<br>5. Cross currency basis swap spreads XCCY<br>6. Foreign exchange pricing defaults XDF<br><br>**CALCULATORS**<br>1. Calculate and monitor FX forwards FRD<br>2. Options calculator OVML<br>3. Analyze FX and interest rate arbitrage FXFA<br>4. Calculate exchange-for-physical pricing EFP | 43-48 |

| Module No. | Topic | Sessions |
|---|---|---|
| 8 | **Technical indicators/Analytics and Charts:**<br><br>Markets, Industry, sectors and Company in-depth analyses using Graphic fundamentals.<br><br>**Explain & Illustrate various Technical / Analytical Charts**<br>1. Charting portal CHAR<br>2. Multi-asset volatility and correlation analysis VCA<br>3. Compare and analyze hedging strategies HWIZ<br>4. Graph FX term structures XCRV<br>5. FX trading sessions graph FX24<br>6. Market impact monitor ECMI<br>7. BETA - Historical beta<br>8. RITA - Real-time intraday Trade analysis<br>9. TAYL - Taylor rule model<br>10. GS - scatter chart<br>11. Candle Chart<br>12. AMZ - Score etc. | 49-54 |

**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 |
|---|---|---|---|---|
| 1.1 | Assessment  - Theory | Individual | 20 | CO1, CO2 |
| 1.2 | Pratical /Financial Market Analyses report | Group | 80 | CO4, CO3 |
|  | Year End Exams |  | 100 | CO1, CO2, CO3, CO4. |
|  | **Total** |  | 100 |  |

| Prepared by:<br>**(Faculty name and signature with date)** | **Prof. Prakash Rathod** |
|---|---|
| Approved by:<br>**HOD – Name and signature with date** | **Dr. Anil Gor** |

# N. L. Dalmia®
## Institute of Management
## Studies and Research

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

# A.Y. 2018-19
# Bloomberg Analyst Certificate

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

# Course Plan

| Program | PGDM (Finance) |
|---|---|
| Course Title | Bloomberg |
| Course Credit | NA |
| Academic Year | 2018-19 |
| Batch | 2018-20 |
| Semester | I & II |
| Duration (Hrs) | 90 |
| Name of the Faculty | Prof. Prakash Rathod |
| HOD | Dr. Anil Gor |

## 1. Course Overview

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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 : |
|--------|------------------------------------------------------|
| CO1 | 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. |
| CO2 | 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. |
| CO3 | Analyze Portfolio and risk analytics, monitoring, characteristics, attribution, historical performance & pinpoint the sources of active risk in portfolios with fundamental risk factor Models. |
| CO4 | Get 2 Bloomberg Technical Training Certifications namely Bloomberg Market Concepts (BMC) and Bloomberg Analyst Certification |

## 3. Course Overview

| Module No. | Topic | Sessions |
|------------|-------|----------|
| 1 | **Introduction and System Navigation:**<br><br>Introduction to Bloomberg<br>Key Board navigation<br>Basic commands<br>Understand Bloomberg Terminals, History, founder, Login credentials,<br>Explain the Bloomberg Keyboard<br>The red stop keys, green action keys and yellow market sector keys help you access information quickly and easily. ACCESSING THE APPLICATION;<br>Bloomberg panels, settings, create a login name and password when logging in for the first time & instruction on working on Bloomberg terminal.<br>   1. BU – Bloomberg University<br>   2. MAG – Bloomberg Magazine<br>   3. CN – Current News<br>   4. NI – Search News for Specific Category<br>   5. TNI – Search News by Keyword<br>**Types of Functions**<br>**Non-security functions** - Non-security functions provide information or analysis on an entire market sector and do not require a loaded security.<br>**Security-specific functions** - Security-specific functions analyze a loaded security.<br>**Using Functions** - There are two main way to run functions, depending on whether or not you know the function mnemonic (a short, memorable name or code). | 1-3 |

| Module No. | Topic | Sessions |
|---|---|---|
| | | |
| | **Economic indicators:**<br><br>Discover the fundamentals of how economic indicators are published and analyzed using various Bloomberg functions.<br><br>**Illustrate various world & domestic Economic Indicators Bloomberg Commands**<br><br>1. WECO - World economic calendar<br>2. ECST - Macroeconomic parameters<br>3. EMKT -Emerging Market trends<br>4. ECOW -World eco stats<br>5. WEI – World equity Indices<br>6. World central bank portals.<br>7. ECO - Economic calendars of countries<br>8. FCON - Financial condition monitor for a country<br>9. IFMO - Inflation monitor<br>10. CENB - Central bank finder (select region -> central bank)<br>11. ECFC - Economic forecasts & indicators<br>12. ECTR - Trade flow analysis<br>13. ECSU - Economic surprise monitor<br>14. WIRP - World int rate probability<br>15. ECWB - Economic workbench | 4-13 |
| 3 | **Equities:**<br><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.<br><br>**Equity Overview & Illustrate various Equity Bloomberg Commands**<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<br>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 &amp; Estimates | 14-24 |

| Module No. | Topic | Sessions |
|---|---|---|
| | 1. GIP – Intraday Price Chart<br>2. GPO – Year to Year Price Chart<br>3. ANR – Analysts Recommendation<br>4. RV – Relative Valuation<br>5. MA – Mergers &amp; Acquisition<br>6. CNDL – Candlestick Chart<br>7. COMP – Compare two securities while viewing a graph<br>8. MOST – Most Active Securities<br>9. FUND – Mutual Fund Search<br>10. EVTS – Company Events<br>11. CN – Current News<br>12. NI – Search News for Specific Category<br>13. 23.PORT - portfolio & risk analytics<br>14. KI - Key insights<br>15. SPLC- Supply chain analysis<br>16. TMSG - Trade ideas etc. | |
| 4 | **Bloomberg Market Concepts:**<br>Bloomberg Technical Training Certification. | 25-32 |
| 5 | **Money Market:**<br><br>T-bills, Commercial Paper, Call money market, Commercial Bill Market, Repo and Reverse Repo.<br>function to learn more about money markets<br><br>**Money market overview & Illustrate various Equity Bloomberg Commands**<br>1. Treasury and money markets BTMM<br>2. Multi-asset markets monitor<br>3. OTC Money market program list PGM<br>4. Money markets rates MMR<br>**Repo**<br>1. Repo/Reverse repo analysis RRRA<br>2. Buy/Sell back repo analysis BSR<br>3. Bond forward price analysis FPA<br>4. Cost of carry for a bond COC<br>5. Cross-Currency repo calculator FE6<br>**Markets monitoring**<br>1. World interest rates probabilities WIRP<br>2. Implied market policy rates MIPR<br>3. Spot/Forwards monitor FXFR<br>4. Interest rates swaps monitor IRSB<br>5. Forward curve matrix FWCM<br>6. Money market new issuance NIM | 32-35 |

| Module No. | Topic | Sessions |
|---|---|---|
| | **Trading solutions & execution** | |
| |    1. Treasury console TCON | |
| |    2. Money market offerings ECPX / BOOM | |
| |    3. Electronic FX trading FXGO | |
| |    4. Tri-Party/General RPOV | |
| |    5. collateral repo ticket IB Dealing IBD | |
| |    6. Tri-Party confirmation ticket TCNF | |
| |    7. Repo confirmation RRRA | |
| |    8. Request for repo inquiries RPOQ | |
| |    9. Excel templates for money market XLPT | |
| | **Pricing & analysis** | |
| |    1. Arbitrage opportunities FXFA for deposit rates FX | |
| |    2. Forward calculator FRD | |
| |    3. Synthetic FRAs EDSF | |
| |    4. Swaps calculator SWPM | |
| |    5. Cross currency funding XCF | |
| |    6. Liquidity assessment LQA | |
| | **Additional information** | |
| |    1. Calendar for all countries CDR | |
| |    2. Days between dates DCX | |
| |    3. Money market curves MMCV | |
| |    4. Global prime rates PRIM | |
| |    5. Treasury bill auction AUCR | |
| |    6. Private money market security add DES ADD | |
| 6 | **Fixed income securities/ Bond Market:** <br><br> Deep into the world of Fixed Income, with sub modules including The Roots Of The Bond Market, Bond Valuation. <br> 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. <br> **Bond market overview & Illustrate various Equity Bloomberg Commands** <br>    1. WB - World bond market (select region) <br>    2. SRCH -Fixed income search (ask question -> result) <br>    3. GIQ - intraday market chart <br>    4. BXT -Buy ticket <br>    5. SXT - Sell ticket <br>    6. CRPR - Credit rating profile <br>    7. FIPX - Fixed income price discovery <br>    8. NIM - New issue monitor <br>    9. WBF - world bond futures <br>    10. FICM - Fixed income credit monitor | 36-42 |

| Module No. | Topic | Sessions |
|---|---|---|
| | 11. FIRV - Fixed income relative value<br>12. FIW - Fixed income worksheet<br>13. STNI - suggested news filters<br>14. RATC - rating changes | |
| 7 | **Currencies/FX Market:**<br><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.<br><br>**FX market overview & Illustrate various Equity Bloomberg Commands**<br><br>**NEWS & RESEARC**<br><br>    1. First Word for FX FIRS<br>    2. Virtual currency monitor VCCY<br>    3. Key FX news NI FXKEY<br><br>**IDEA GENERATION**<br>    1. FX Information Portal FXIP<br>    2. Rank and compare currencies WCRS<br>    3. Custom real-time FX dashboards XDSH<br>    4. FX forecasts FXFC<br>    5. FX probability calculator FXFM<br>    6. Customize and backtest FX trade strategies FXSW<br>    7. Bloomberg U.S. Dollar Index BDXY<br>    8. Share and track FX ideas IDEA<br>    9. Implied volatility matrix WVOL<br><br>**MARKET MONITORS & PRICING**<br><br>    1. Executable based pricing BGNE<br>    2. All quotes for a currency instrument ALLQ<br>    3. Spot and forward fixing rates BFIX<br>    4. World currency spot rates WC<br>    5. Cross currency basis swap spreads XCCY<br>    6. Foreign exchange pricing defaults XDF<br><br>**CALCULATORS**<br>    1. Calculate and monitor FX forwards FRD<br>    2. Options calculator OVML<br>    3. Analyze FX and interest rate arbitrage FXFA<br>    4. Calculate exchange-for-physical pricing EFP | 43-48 |

| Module No. | Topic | Sessions |
|---|---|---|
| 8 | **Technical indicators/Analytics and Charts:**<br><br>Markets, Industry, sectors and Company in-depth analyses using Graphic fundamentals.<br><br>**Explain & Illustrate various Technical / Analytical Charts**<br> 1. Charting portal CHAR<br> 2. Multi-asset volatility and correlation analysis VCA<br> 3. Compare and analyze hedging strategies HWIZ<br> 4. Graph FX term structures XCRV<br> 5. FX trading sessions graph FX24<br> 6. Market impact monitor ECMI<br> 7. BETA - Historical beta<br> 8. RITA - Real-time intraday Trade analysis<br> 9. TAYL - Taylor rule model<br> 10. GS - scatter chart<br> 11. Candle Chart<br> 12. AMZ - Score etc. | 49-54 |

**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 |
|---|---|---|---|---|
| 1.1 | Assessment - Theory | Individual | 20 | CO1, CO2 |
| 1.2 | Pratical /Financial Market Analyses report | Group | 80 | CO4, CO3 |
| | Year End Exams – BAC | | 100 | CO1, CO2, CO3, CO4. |
| | **Total** | | 100 | |

| Prepared by:<br>**(Faculty name and signature with date)** | **Prof. Prakash Rathod** |
|---|---|
| Approved by:<br>**HOD – Name and signature with date** | **Dr. Anil Gor** |

# A.Y. 2018-19
# MarkStat

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

A.Y 2018-19 (Batch 2017-19)

Mark Strat- Marketing Simulation

Markstrat – Simulation 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

## Digital MarkStrat

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**

## MarkStrat

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 MarkStrat

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 sustainabillity & profitability can be synergistic
- Adopt digital transformation for environmental good

**learn more**

## BOSS

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
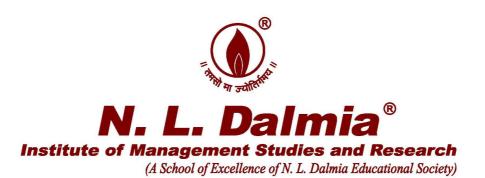- Navigate key digital media challenges.

learn more

## MixPRO

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

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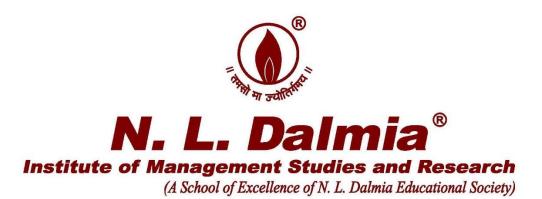- 3 hours
- B2C Durable Goods (electronics)

**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

# A.Y 2018-19
# Certificate program in
# Investment Banking

**Report on Value Added Course**

**Title of the course-** "Certificate program in Investment Banking"

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

**Dates-** 2$^{nd}$ September 2018 to 15$^{th}$ September 2018

**Duration of the Course -25 hours**

**Timings -** 2$^{nd}$ September 2018, 8$^{th}$ September 2018,9$^{th}$ September 2018,14$^{th}$ September 2018 and 15$^{th}$ September 2018 (10am to 5pm- Weekend course)

**Resource Person-** Mr. Prateek Soni, Partner, Deloitte

**Brief Description-**

There was 25 hour value added program conducted by Mr. Prateek Soni (Aluminous of NLDIMSR) between 2$^{nd}$ September 2018 to 15$^{th}$ September 2018 on investment banking with topics such as financial modeling, Explain the mechanics of an Initial Public Offering Build valuation models – DCF, LBO and multiples etc. The course was mainly conducted keeping in mind recruiters like Citi group who visit campus every year in the month of October. It was competed by all the 100 students who had enrolled for the course.

## Re: Proposed Program on Investment Banking.

## Dinesh Hegde <dinesh.hegde@nldalmia.edu.in>
Fri 8/24/2018 12:04 PM

**To:** Anil Gor <anil.gor@nldalmia.edu.in>; Dinesh Hegde <dinesh.hegde@nldalmia.in>; Prof. Seema Saini <seema.saini@nldalmia.in>
**Cc:** Neela Mayee <exam@nldalmia.in>; reception@nldalmia.in <reception@nldalmia.in>

Approved. Very good initiative for value addition to our students without any cost implications to the Institute!  Hope, you have ensured it doesn't clash with other events already scheduled.

Dr. Dinesh Hegde
Dean Academic & Head-Research & Consulting
NL Dalmia Institute of Management Studies & Research,
Tel    : +91 22 4299 0033/44 Extn.758
Mob   : +91 98198 47626
Email : dinesh.hegde@nldalmia.edu.in

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**From:** Anil Gor <anil.gor@nldalmia.edu.in>
**Sent:** 24 August 2018 11:44
**To:** Dinesh Hegde; Prof. Seema Saini
**Cc:** Neela Mayee; reception@nldalmia.in
**Subject:** Proposed Program on Investment Banking.

Dear Sir,
Every year we receive placement offer from Citi group for Investment Banking profile. also Citi is likely to visit our campus on 8th/ 9th October,2018. In order to prepare our students for this profile, I am proposing to have a Certificate Program in Investment Banking for 25 Hours commencing from Sunday, 2nd September,2018.The program details would be as under:
Faculty : Prateek Soni our alumni working at Deloitte ( He worked for 4 years in CITI in Investment Banking profile before jining Deloitte.
Cost : Rs.2000/- per hour will paid to Mr Soni whoc also conducts such courses at other INSTITUTES at much higher fees but we have made him agree to RS. 2000/- PER HOUR.
Total Cost Rs. 55,000/- ( 50,000 PAYABLE TO fACULTY PLUS rS.5000/- TOWARD S COOST OF Certificates etc.)
Recovery of cost : Students will pay this cost. I have made this program voluntary and expect about 100 STUDENTS ( OUT OF 160 FINANCE STUDENTS TO JOIN ) Hence per student cost will be reduced to Rs.550/- which is reasonable.
Dtes of the Program : Sunday 2ndSeptember, Saturday8th September,Sunday 9th September, Saturday 14t September and Sunday 15th September. ( 5 DAYS , FIVE HOURS ON EACH DAY)
Submitted for information and approval please.
I have marked copies to Neeal Madam so that Saturday time table is mad free for this program, and to Floren at reception to book Auditorium on 2nd SEPTEMBER AND sEMINAR hALL ON OTHER DAYS.
with regards,
Dr. Anil Gor
M.Com, LL.M. M.F.M, Ph.D.FCS, CAIIB
Chairman Placements / H.O.D. (Finance)
N. L. Dalmia Institute of Management Studies & Research
Sector-1, Shristi, Mira Road , Mumbai 401104
Dir :+91 22 42990054 / 80 / 81 /82
Mobile + 91 9322242439 / 9930230374
**E mail: placements@nldalmia.in / anil.gor@nldalmia.edu.in**

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 Carnegic Training (Competency Modelling) (AY2021-22) | 22 | 8 | 30 |

Head of Accreditation

Prof. (Dr.) Vaishali Kulkarni.