



**DEPARTMENT OF DISTANCE & CONTINUING EDUCATION,  
SCHOOL OF OPEN LEARNING,  
CAMPUS OF OPEN LEARNING, UNIVERSITY OF DELHI**

## **Certificate Course in Wealth Management Program**

### **Structure Of Lesson Plan**

S.no	Topic
1	Basics of Finance: Time Value of Money, Risk and Return
2	Asset classes and Asset Allocation
3	Understanding the Basics of Personal Finance
4	Financial Planning: Concept and Process
5	Indian Financial Industry
6	Primary Markets: Structure and Participants
7	Secondary Markets: Structure and Working
8	Equity Analysis and Investing
9	Debt Markets: Risks and Types of Securities
10	Introduction to Derivatives: Futures
11	Introduction to Derivatives: Options
12	Mutual Funds: Product Matrix and Equity Funds
13	Mutual Funds: Debt and Hybrid Funds
14	Financial Planning and Mutual Funds
15	Mutual Funds - Process Aspects
16	Insurance Concepts and Principles
17	Life Insurance
18	Health and General Insurance
19	Introduction to Other Investment Products: Small Saving Schemes and Pension Products
20	Banking: Products and Process Aspects
21	Online Practise Exam (from laptop / desktop)
22	Final Exam (from laptop / desktop)
23	Case Studies, Quizzes, Project and Practical
24	Micro Quizzes
25	Practical Research