



Certificate Course in
**Financial Planning and
Investment Management**

Duration: 3 Months

Certificate Course in
Applied Data Analytics

Duration: 3 Months

Live Classes

**Course Commencement Date:
15th February 2021**

Birla Global University

IDCO Plot No. 2, Institutional Area, Gothapatna, Bhubaneswar - 751029, Odisha, India

Tel: 0674-7103001-10, Fax: 0674-7103011 | Website : www.bgu.ac.in



Certificate Course on **Financial Planning and Investment Management**



About the Course

The level of financial literacy varies according to education and income levels, the general level of financial literacy in the country is less than 5 percent and much less in Odisha due to which a large number of people are easily duped through different chit funds and other illegal high return promising savings and investment schemes. The general public is not aware of the risks and returns associated with different savings and investment opportunities available in the financial market. While government of India and the state governments and banks are offering different saving and investment schemes, too often the different financial terms associated with these schemes are not easily understood by the common people. With the increase in the average life expectancy, many retired people face problems of judicious investment of their savings so as to cater to the various requirements of old age including medical expenses. It has very often seen that many people continue to invest their hard earned money in various speculative and illiquid investments which create lots of discomforts at later stages.

In the above background, this course aims to educate the participants about the various savings and investment opportunities available in the financial market for the common man including the risks and return associated with each of the investment schemes.



Course Objectives

The main objective of the course is to cater to the need of developing the level of financial literacy of the general public both in the state and outside. Objectives in Specific:

- To provide a broad knowledge and understanding of various Savings and Investment Opportunities available in the market. The aim of this course is to help the individual to manage their personal financial affairs.
- To help the participants to understand the important terms, rules, concepts, principles and theories related to financial planning & investment management.
- To enable participants to learn the basic principles of Taxation system in India and how to file the return with proper tax planning.



Learning Outcomes

- Develop an understanding of the major conceptual aspects of finance and how they relate to other areas of savings and investment.
- Select appropriate savings and investment options with trade-off between risk and return.
- Work as financial professional making ethical judgments and decisions.
- Understand and manage the different types of risks associated with different saving
- Know the basic principles of Taxation system practiced in India, the various exemptions and concessions available to individual's tax payers and help them in tax planning and reducing tax liability. The individual will also learn how to file their tax return electronically.



Target Participants

Students, traders, entrepreneurs, employees, professionals, bankers, retired persons, housewives and all other aspirants who are keen to seek knowledge about financial planning and investment management.



Eligibility

Minimum Plus two pass in any discipline.



Certificate

Upon successful completion of the programme, the certificate would be issued by the Birla School of Commerce of Birla Global University, Bhubaneswar.



Duration and Timing of the course

3 Months (60 hours). During the weekend.



Course fee

Rs. 5,000 per participant



Delivery Mode

Live classes will be scheduled on an online platform.



Assignment

Under this course the participant will be evaluated through online quiz presentation.





SYLLABUS

Module-1: Basic Elements of Financial Planning (15 hours)

Module-2: Savings and Investment Opportunities (15 hours)

Module-3: Risk Management & Insurance (15 hours)

Module-4: Tax Planning (15 hours)



MODE OF PAYMENT

Make payment through NEFT/Cheque/Demand Draft in favour of “Birla Global University”

Account Name : Birla Global University

Bank Name : UCO Bank

Branch Address: Gothapatna, Bhubaneswar

Bank A/C No : 31090110018897

IFSC Code : UCBA0003109



COURSE COORDINATORS

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Certificate Course on **Applied Data Analytics**



About the Course

- This certificate course focuses on scientific and technical way of data analysis by using advanced software tools.
- It will cover basic statistics, data analytic techniques, data visualization and how to deal with business data management.
- It will further include significant programming languages R and Python, how to create data visualizations using Tableau and how to apply statistics and predictive analytics in a business environment with relevant CASE studies.





Course Objectives

- To exhibit scientific and technical way of data analysis by using advanced software tools
- To communicate the participants data analysis techniques, data pre-processing, data visualization and how to deal with data management in any field.
- To relate statistics and predictive analytics in a business environment with experiments and demonstrations using R, Python and Tableau.



Learning Outcomes

After completion of the course the participants will be able to-

- Use proper techniques for analytical Solutions
- Acquire problem solving ability of complex business decisions, quantitative literacy and critical thinking in seeking solutions to complex business problems.
- Develop analytical decision making in multiple fields.
- This course will help students develop these skills and qualities and equip them to lead and manage organizations of any size.



Target Participants

- Students, Researchers & Academicians
- Corporate Professionals



Eligibility

Graduation / (Continuing Graduation) / Diploma / PG Diploma /PG / equivalent



Certificate

Upon successful completion of the programme, the certificate would be issued by the Birla School of Management of Birla Global University, Bhubaneswar.



Duration and Timing of the course

3 Months (60 hours). During the week end.



Course fee

Rs. 5,000 per participant



Delivery Mode

Live classes will be scheduled on an online platform.



Assessment

- Project Based Evaluation





SYLLABUS

Module1: Introduction to Data Analytics (10 hours)

Module2: Data visualization using Tableau (10 hours)

Module-3: Data Analysis using Excel & SPSS (15 hours)

Module 4: Data analysis using R & Python (15 hours)

Module 5: Application of Analytics in CASEs related to various fields (10 hours)



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COURSE COORDINATORS

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Application Form

Put tick mark (✓) course applied for.

**Certificate Course on
Financial Planning and
Investment Management**

Applied Data Analytics

1. Name:
2. Designation/ if Student, the Course Name:
3. Academic Qualification:
4. Experience (if Any):
5. Name of the Institution /Organization:
6. Address for communication:
Ph:
Fax:
Email:
7. Bank Payment Details:
Amount:
Reference Number:

Date:

Signature of Applicant

Approval for Candidates/Sponsorship

We approve the above applicant as a candidate/ sponsor for the Certificate course on “
..... ” being organized by Birla Global University,
Bhubaneswar during, 2021.

Date

Signature and seal of approving/
sponsoring Authority (if applicable)

Note: The Application Form duly filled-in may be emailed to the concerned course coordinator.

A high-angle, wide shot of a large, circular atrium. The floor is made of light-colored wood with a circular pattern in the center. The atrium is surrounded by a balcony with a decorative metal railing. Several large white columns support the ceiling. The walls are white and feature framed pictures or posters. A person is visible on the balcony on the left. The overall atmosphere is bright and modern.

Birla Global University

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