Video: Portfolio Management Strategies with ALPHABETA - investment lab on your device
Course Objective

The Indian Mutual Fund & Wealth Management industry is bound to grow manifold in the coming years. Investing programs on the ALPHABETA platform give an opportunity to learn about the portfolio management strategies which are adopted by fund managers. At the end of the course, you will be able to confidently talk about investments, be ready to be an analyst, and eventually manage stocks, ETFs and Funds in your portfolios.

About the Course

"ALPHABETA programs provide a practical introduction to portfolio management. Using an interactive App, the learning is driven by simulation techniques that allow you to visualize stocks, ETFs and funds, learn concepts, make decisions, and create trades like a portfolio manager. You will start with simple concepts and graduate progressively to more complex strategies using both statistical and fundamental methods.

Everything you will learn in this course is grounded in strong academic research but is also used by leading real-world portfolio managers. The concepts in this course serve as the basis for the management of hundreds of billions of rupees of assets daily. There are 2 learning paths (certifications):
• Introduction to Portfolio Management
• Systematic Strategies for Equity Portfolio Management"

Features

Concepts are grouped as
• Analytical - based on finance theory
• Quantitative - based on math
• Heuristic - based on best practice acquired through repetition

Under each module, a few learning topics are bunched together to make the understanding of the concept simple, clear and effective. As you progress through the Lab Experiments, you will learn one new concept in each category and apply them either by re-doing the Lab Experiment, or by back-testing on Simulate mode. As a learner, you will have access to video lectures, Lab Experiments (plus additional simulations), presentation supplements and live doubt clearing sessions, once each week. The topic of the weekly session will be published in advanced and will be available to you as the sessions calendar.

At the end of each module, you will have an assignment that will be heavily based on the lab experiments, simulations and your reading of the academic papers for additional credit. In many cases, you will be asked to perform the lab experiment first, then test a given hypothesis on Simulation. And last, but not the least, based on your analysis, recommend a position on Manage (real time virtual portfolio) and track its performance. While doubt clearing sessions, video lectures and presentation materials are provided, they are merely the scaffolding to the real learning that will come from doing things practically and interactively on the ALPHABETA App.
Benefits

- Learn on the Go
- Game based pedagogy
- Manage portfolios in real time
- Advanced trading strategies
- Simulate and back-test strategies with real market data, for past 6 years
- Learn rigorous academic and professional research content in a visual exploration environment
- Live doubt clearing sessions with our academic experts
- Compete globally with your peers to establish your track record
- Earn multiple performance based joint certification from NSE Academy Limited – the wholly owned subsidiary of NSE and New York headquartered, ALPHABETA Inc
- Available on iOS, Android, MAC OS X, Windows 10

Curriculum/ Course Content

All modules are interwoven with Lab Experiments and Simulations. These topics combined allow learners to complete 2 certifications:

- **Introduction to Portfolio Management**
- **Systematic Strategies for Equity Portfolio Management**

Topics include:

- Introduction to portfolio and financial asset classes
- Passive Investing - concept of Exchange Traded Funds (ETFs) and Index funds
- Active Portfolio Management - mutual funds, short selling, trading on leverage and long-short hedged portfolios
- long-short hedged portfolios
- Fundamental vs. Statistical Approaches
  - Investment horizons
  - Systematic approaches – alpha, beta, mrap
- Introduction to systematic approaches and market phenomena
  - Use past Momentum to predict future returns
  - Identify similar stocks and profit using Pairs Trading
- Value Investing to discern under priced and overpriced stocks
- Use Accruals and Cash flow to differentiate stocks based on earnings quality

- Underlying theories in portfolio management

- Capital asset pricing model (CAPM)
- Risk return trade off
- Statistical methods – regression, correlation, law of large numbers
- Trading techniques – short selling, basket trading
- Fundamental analysis – market and book value, earnings, accruals
- Ratio analysis for value investing – monotonic functions, ratio selection
- Risk management – diversification, hedging, market and sector neutral approaches
- Judgment and heuristics in markets and trading
Eligibility

Ideally, some knowledge of basic finance and accounting concepts is desirable, but this is not mandatory. We do not believe that learning is necessarily a linear process, so you can always fall back and learn concepts as and when you encounter them. All you will require are basic mathematical and reasoning skills at a high school level along with a healthy mix of curiosity and enthusiasm without fear of failing. Our motto is “Try, fail, try again, learn, validate, and apply”

Faculty

Kirthi Ramakrishnan
20 years in financial services and fintech
Head of BFS Emerging Businesses at Cognizant
Cognizant, Financial Models, BBVA Bancomer
BE from Anna Univ, MBA from Tulane

Dr. Vikram Kuriyan (in-app instructor)
Chairman, GWA Investment Advisors
Director, ISB Investment Laboratory
25 years in quantitative research
Bank of America, Columbia Asset Management, Merrill Lynch
BS from MIT, PhD from Harvard

Sathya Palaniappan
Head of Product Management, COO APAC
20 years in financial services
Cognizant, Citicorp, HDFC, Sundaram MF
ICAI certified Chartered Accountant
GARP Certified Financial Risk Manager

Divya Gosain
Head of Service Delivery, India
12 years in financial services - asset management, M&A, financial analysis
Cognizant Consulting, JP Morgan,
MBA from MDI Delhi and B.Engg in Automation Engineering from Delhi Univ
Testimonials

Sakina Olia (HR professional with a Masters in Psychology)

The best part about the programme was the simulation based application which made the entire course practical and hands on. The expert and mentor session over the weekend made sure that the students were proactive and were not taking a backseat in their learning approach. Also, the faculty was very warm and open to answering as many questions that we had which made me feel very comfortable in coming forward with my queries. Overall, a hands-on course to help you get started with understanding the nuances of the stock market.

Sarvagya Kaushik (Chartered Accountant student and CFA aspirant)

This course has reshaped my career from Accounting to Finance. The professors gave us the practical knowledge along with all the concepts of the Portfolio Management Strategies. The Alphabeta App is the best part of the course where you get to learn and perform the simulations on the real market data. It's a great experience to start your career in finance. I’m a student of ICAI & I’m also pursuing Chartered Financial Analysts course from CFA Institute.

Shruti Khairkar (Student, IIT Bombay)

Being constantly exposed to theoretical study in all my academic life, the most fascinating part of joining this course was the offer to try out strategies practically. Teamwork and competition are the pillars to problem solving and ALPHABETA resolutely exposed us to both of them. ALPHABETA has enclosed the curriculum in such a way that it makes us ready to trade with real data, exposing us to risks and failures. It has been a huge learning experience while preparing me to do real trades.

Nishtha Nagpal (CA, working with Deloitte)

I had an extremely amazing and awesome experience during the EPM program. The mentors were highly knowledgeable, patient and encouraging. Also, I would like to mention the effectiveness and efficiency of the support faculty. I wish to keep my association with you all. Thanks for all the guidance and support!

Arindam Mullick (NRI Investor and Oil and Gas professional)

"CEPM course has given me a different perspective of equity market and changed the way I manage my investment portfolio’s Alpha and Beta. I would recommend this course as a starting point to every investor and future portfolio manager because of its well-designed content, investment strategies, and interactive lab. Course experience is designed and managed by an excellent professional team."
About the company

ALPHABETA is the first platform to use true visual collaboration to bring together students, practitioners and consumers in financial markets through unique immersive user experiences with a common vocabulary. The first product, ALPHABETA-Guide platform is designed to educate students in investment strategies and Portfolio Management. Its inclusive pedagogical approach using an “active learning space” which makes the complex concepts of finance intuitively simpler for learners from diverse backgrounds who may lack the mathematics training that has traditionally been a prerequisite. The proprietary app, US Patent approved is targeted at graduate, undergraduate and high school students, investment managers, traders and wealth managers.

ALPHABETA represents the first manifestation of technologies set to transform the industry. It has multiple releases of the Guide, and impending launches of the other Platforms, Analyst and Assistant, due for this year. Analyst is a complete touch screen based modelling environment to crowdsource investment strategies and Assistant will connect wealth advisors to analysts and clients with compelling user experience for financial management.

ALPHABETA was launched in 2014 by TOPXIGHT LABS (www.topxight.com), a New York based software lab and incubation studio, with New York based Valmiki Capital Management as the founding investor.

HOW TO ENROLL

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FEE STRUCTURE

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Yearly : 13,500 (inc tax)

Venue/where would the course be conducted

"Online Program
Learn anytime, anywhere on the ALPHABETA app supported by Weekly Live Expert Sessions"

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May prosperity always bloom