

LEARNING OUTCOME BASED VOCATIONAL CURRICULUM

JOB ROLE: Mutual Fund Agent

(QUALIFICATION PACK: Ref. Id. BSC/Q3802)

SECTOR: Banking, Financial Services and Insurance

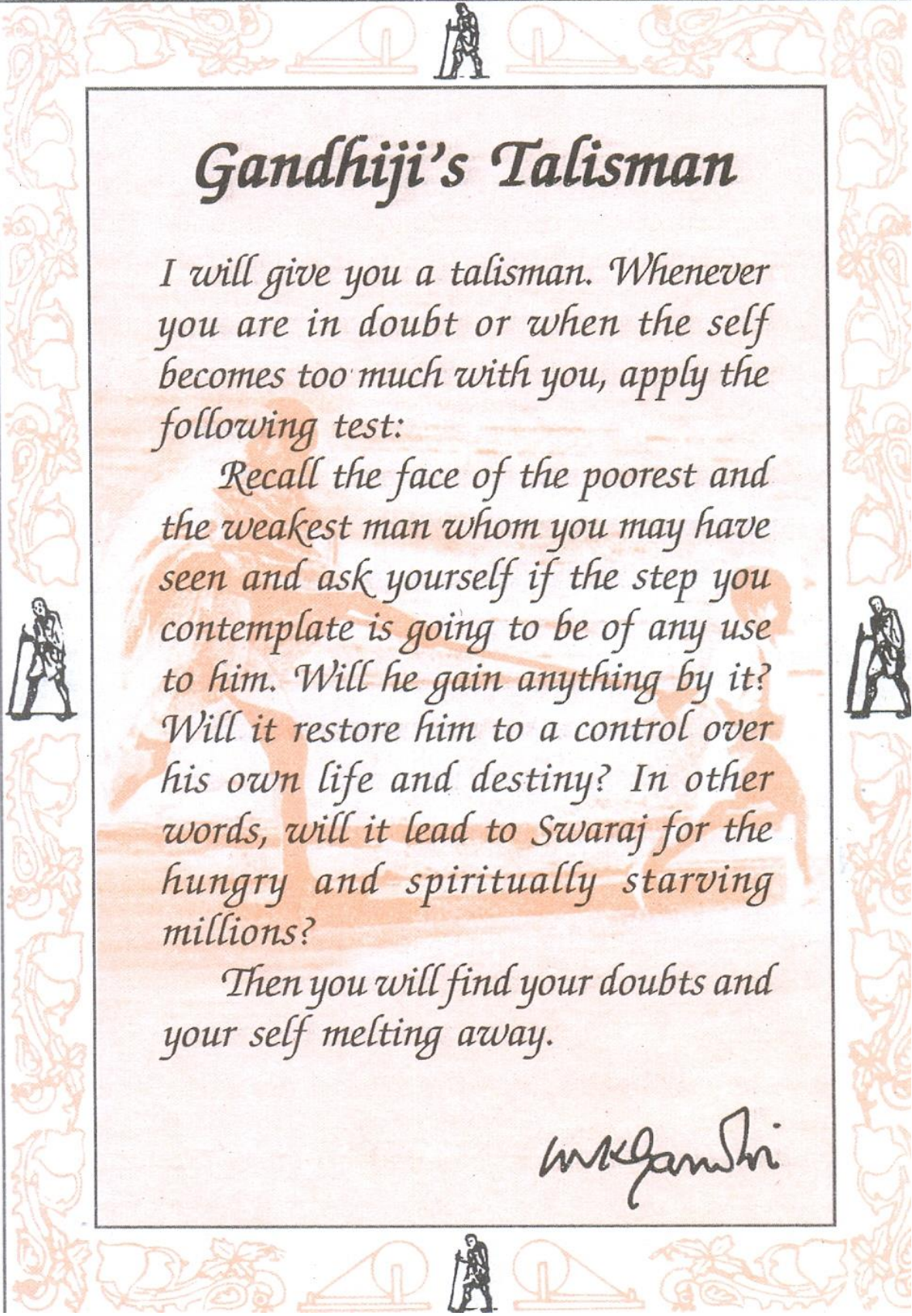
Classes 11 and 12



PSS CENTRAL INSTITUTE OF VOCATIONAL EDUCATION

Shyamla Hills, Bhopal- 462 013, M.P., India

<http://www.psscive.ac.in>



Gandhiji's Talisman

I will give you a talisman. Whenever you are in doubt or when the self becomes too much with you, apply the following test:

Recall the face of the poorest and the weakest man whom you may have seen and ask yourself if the step you contemplate is going to be of any use to him. Will he gain anything by it? Will it restore him to a control over his own life and destiny? In other words, will it lead to Swaraj for the hungry and spiritually starving millions?

Then you will find your doubts and your self melting away.

M.K. Gandhi

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BFSI - Mutual Fund Agent

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FOREWORD

The Pandit Sunderlal Sharma Central Institute of Vocational Education (PSSCIVE) a constituent of the National Council of Educational Research and Training (NCERT) is spearheading the efforts of developing learning outcome based curricula and courseware aimed at integrating both vocational and general qualifications to open pathways of career progression for students. It is a part of Centrally Sponsored Scheme of Vocationalisation of Secondary and Higher Secondary Education (CSSVSHSE) launched by the Ministry of Human Resource Development, Government of India in 2012. The PSS Central Institute of Vocational Education (PSSCIVE) is developing curricula under the project approved by the Project Approval Board (PAB) of *Rashtriya Madhyamik Shiksha Abhiyan* (RMSA). The main purpose of the learning outcome based curricula is to bring about the improvement in teaching-learning process and working competences through learning outcomes embedded in the vocational subject.

It is a matter of great pleasure to introduce this learning outcome based curriculum as part of the vocational training packages for the job role of **Mutual Fund Agent (BSC/Q3802)**. The curriculum has been developed for the higher secondary students of vocational education and is aligned to the National Occupation Standards (NOSs) of a job role identified and approved under the National Skill Qualification Framework (NSQF).

The curriculum aims to provide children with employability and vocational skills to support occupational mobility and lifelong learning. It will help them to acquire specific occupational skills that meet employers' immediate needs. The teaching process is to be performed through the interactive sessions in classrooms, practical activities in laboratories and workshops, projects, field visits, and professional experiences.

The curriculum has been developed and reviewed by a group of experts and their contributions are greatly acknowledged. The utility of the curriculum will be adjudged by the qualitative improvement that it brings about in teaching-learning. The feedback and suggestions on the content by the teachers and other stakeholders will be of immense value to us in bringing about further improvement in this document.

Hrushikesh Senapaty
Director

National Council of Education Research and Training

PREFACE

India today stands poised at a very exciting juncture in its saga. The potential for achieving inclusive growth are immense and the possibilities are equally exciting. The world is looking at us to deliver sustainable growth and progress. To meet the growing expectations, India will largely depend upon its young workforce. The much-discussed demographic dividend will bring sustaining benefits only if this young workforce is skilled and its potential is channelized in the right direction.

In order to fulfill the growing aspirations of our youth and the demand of skilled human resource, the Ministry of Human Resource Development (MHRD), Government of India introduced the revised Centrally Sponsored Scheme of Vocationalisation of Secondary and Higher Secondary Education that aims to provide for the diversification of educational opportunities so as to enhance individual employability, reduce the mismatch between demand and supply of skilled manpower and provide an alternative for those pursuing higher education. For spearheading the scheme, the PSS Central Institute of Vocational Education (PSSCIVE) was entrusted the responsibility to develop learning outcome based curricula, student workbooks, teacher handbooks and e-learning materials for the job roles in various sectors, with growth potential for employment.

The PSSCIVE firmly believes that the vocationalisation of education in the nation need to be established on a strong footing of philosophical, cultural and sociological traditions and it should aptly address the needs and aspirations of the students besides meeting the skill demands of the industry. The curriculum, therefore, aims at developing the desired professional, managerial and communication skills to fulfill the needs of the society and the world of work. In order to honour its commitment to the nation, the PSSCIVE has initiated the work on developing learning outcome based curricula with the involvement of faculty members and leading experts in respective fields. It is being done through the concerted efforts of leading academicians, professionals, policy makers, partner institutions, Vocational Education and Training experts, industry representatives, and teachers. The expert group through a series of consultations, working group meetings and use of reference materials develops a National Curriculum. Currently, the Institute is working on developing curricula and courseware for over 100 job roles in various sectors.

We extend our gratitude to all the contributors for selflessly sharing their precious knowledge, acclaimed expertise, and valuable time and positively responding to our request for development of curriculum. We are grateful to MHRD and NCERT for the financial support and cooperation in realising the objective of providing learning outcome based modular curricula and courseware to the States and other stakeholders under the PAB (Project Approval Board) approved project of *Rashtriya Madhyamik Shiksha Abhiyan* (RMSA) of MHRD.

Finally, for transforming the proposed curriculum design into a vibrant reality of implementation, all the institutions involved in the delivery system shall have to come together with a firm commitment and they should secure optimal community support. The success of this curriculum depends upon its effective implementation and it is expected that the managers of vocational education and training system, including subject teachers will make efforts to create better facilities, develop linkages with the world of work and foster a conducive environment as per the content of the curriculum document.

The PSSCIVE, Bhopal remains committed in bringing about reforms in the vocational education and training system through the learner-centric curricula and courseware. We hope that this document will prove useful in turning out more competent Indian workforce for the 21st century.

RAJESH P. KHAMBAYAT
Joint Director
PSS Central Institute of Vocational Education

ACKNOWLEDGEMENTS

On behalf of the team at the PSS Central Institute of Vocational Education (PSSCIVE) we are grateful to the members of the Project Approval Board (PAB) of *Rashtriya Madhyamik Shiksha Abhiyan* (RMSA) and the officials of the Ministry of Human Resource Development (MHRD), Government of India for the financial support to the project for development of curricula.

We are grateful to the Director, NCERT for his support and guidance. We also acknowledge the contributions of our colleagues at the Technical Support Group of RMSA, MHRD, RMSA Cell at the National Council of Educational Research and Training (NCERT), National Skill Development Agency (NSDA) and National Skill Development Corporation (NSDC) and BFSI Sector Skill Council of India for their academic support and cooperation.

We are thankful to the course coordinator P. Veeraiah and experts for their untiring efforts and contributions in the development of this learning outcome based curriculum. Their names are acknowledged in the list of contributors. The contributions made by Vinay Swarup Mehrotra, Professor and Head, Curriculum Development and Evaluation Centre (CDEC), Vipin Kumar Jain, Associate Professor and Head, Department of Humanities, Science, Education and Research and Dipak Shudhalwar, Associate Professor and Head, Department of Engineering & Technology, PSSCIVE in development of the curriculum for the employability skills.

The assistance provided by Geeta Tomar, Consultant, Department of Business and Commerce, PSSCIVE, Bhopal, in the development of curriculum and Sunita Koli, Computer Operator, & Rachna Pateriya, DTP Operator in typing and designing layout in the Department of Business & Commerce is duly acknowledged.

PSSCIVE Team

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COURSE OVERVIEW

COURSE TITLE: BFSI – Mutual Fund Agent

Mutual Fund Agent is responsible for facilitating buying and selling of mutual funds and providing post sales services. The individual at work offers mutual funds to prospective investors, maintains records of their investment, conducts regular market research to advice customers, and provides post-sales services.

The job requires the individual to have eye for detail, ability to work under pressure and on computer for long hours, and self-motivation.

Mutual Fund Agent also known as Independent Financial Advisor offer mutual funds to prospective investors, maintain records of their investment and conduct regular market research to advise customers, and provide post-sales services

After completion of this course the learner would be able to work as Mutual Fund Agent in BFSI sector to bring the profit for banks by telling about the banking products like mutual fund, offer mutual funds to prospective investors, maintain records of their investment and conduct regular market research to advise customers, and provide post-sales services, customer centric service orientation and banking ethics and team work. They need to have excellent product knowledge, interpersonal and listening skills.

COURSE OUTCOMES: On completion of the course, students should be able to:

- Apply effective oral and written communication skills to interact with people and customers;
- Identify the principal components of a computer system;
- Demonstrate the basic skills of using computer;
- Demonstrate self-management skills;
- Demonstrate the ability to provide a self-analysis in context of entrepreneurial skills and abilities;
- Demonstrate the knowledge of the importance of green skills in meeting the challenges of sustainable development and environment protection;
- Introduce the banking system and
- Conduct research on mutual fund market
- Identify the market and sell mutual funds
- Assist with purchase of mutual funds
- Perform mutual fund after –sales activities
- Communicate effectively and achieve customer satisfaction
- Achieve the integrity, banking ethics and teamwork

COURSE REQUIREMENTS: The learner should have the basic knowledge of commerce, management specially banking aspects.

COURSE LEVEL: This is an Intermediate level course. On completion of this course, a student can take up a Diploma/Degree level course for job roles in higher position.

COURSE DURATION: 600 hrs

Class 11 : 300 hrs

Class 12 : 300 hrs

Total : 600 hrs

2. SCHEME OF UNITS

This course is a planned sequence of instructions consisting of Units meant for developing employability and vocational competencies of students of Class 11 and 12 opting for vocational subject along with general education subjects. The unit-wise distribution of hours and marks for Class 11 is as follows:

CLASS 11			
Units		No. of Hours for Theory and Practical 300	Max. Marks for Theory and Practical 100
Part A	Employability Skills		
	Unit 1: Communication Skills –III	25	10
	Unit 2: Self-management Skills –III	25	
	Unit 3: Information and Communication Technology Skills – III	20	
	Unit 4: Entrepreneurial Skills – III	25	
	Unit 5: Green Skills – III	15	
		110	10
Part B	Vocational Skills		
	Unit 1: Introduction to Banking System and Mutual Fund	40	40
	Unit 2: Research on Mutual Fund Market	45	
	Unit 3: Marketing of Mutual Funds	40	
	Unit 4: Mutual Funds Buying	40	
		165	40
Part C	Practical Work		
	Practical Examination	06	15
	Written Test	01	10
	Viva Voce	03	10
		10	35
Part D	Project Work/Field Visit		
	Practical File/ Student Portfolio	10	10
	Viva Voce	05	05
		15	15
	Total	300	100

The unit-wise distribution of hours and marks for Class 12 is as follows:

CLASS 12			
Units		No. of Hours for Theory and Practical 300	Max. Marks for Theory and Practical 100
Part A	Employability Skills		
	Unit 1: Communication Skills – IV	25	
	Unit 2: Self-management Skills – IV	25	
	Unit 3: Information and Communication	20	

	Technology Skills – IV		10
	Unit 4: Entrepreneurial Skills – IV	25	
	Unit 5: Green Skills – IV	15	
		110	10
Part B	Vocational Skills		
	Unit 1: Post Sales Services in Mutual Fund	40	
	Unit 2: Termination of Mutual Fund	45	
	Unit 3: Customer Centric Service	40	40
	Unit 4: Integrity, Banking Ethics and Team Work	40	
		165	40
Part C	Practical Work		
	Practical Examination	06	15
	Written Test	01	10
	Viva Voce	03	10
		10	35
Part D	Project Work/Field Visit		
	Practical File/Student Portfolio	10	10
	Viva Voce	05	05
		15	15
	Total	300	100

3. TEACHING/TRAINING ACTIVITIES

The teaching and training activities have to be conducted in classroom, laboratory/ workshops and field visits. Students should be taken to field visits for interaction with experts and to expose them to the various tools, equipment, materials, procedures and operations in the workplace. Special emphasis should be laid on the occupational safety, health and hygiene during the training and field visits.

CLASSROOM ACTIVITIES

Classroom activities are an integral part of this course and interactive lecture sessions, followed by discussions should be conducted by trained vocational teachers. Vocational teachers should make effective use of a variety of instructional or teaching aids, such as audio-video materials, colour slides, charts, diagrams, models, exhibits, hand-outs, online teaching materials, etc. to transmit knowledge and impart training to the students.

PRACTICAL WORK IN LABORATORY/WORKSHOP

Practical work may include but not limited to hands-on-training, simulated training, role play, case based studies, exercises, etc. Equipment and supplies should be provided to enhance hands-on learning experience of students. Only trained personnel should teach specialized techniques. A training plan that reflects tools, equipment, materials, skills and activities to be performed by the students should be submitted by the vocational teacher to the Head of the Institution.

FIELD VISITS/ EDUCATIONAL TOUR

In field visits, children will go outside the classroom to obtain specific information from experts or to make observations of the activities. A checklist of observations to be made by the students during the field visits should be developed by the Vocational Teachers for systematic collection of information by the students on the various aspects. Principals and Teachers should identify the different opportunities for field visits within a short distance from the school and make necessary arrangements for the visits. At least three field visits should be conducted in a year.

4. ASSESSMENT AND CERTIFICATION

Upon successful completion of the course by the candidate, the Central/ State Examination Board for Secondary Education and the respective Sector Skill Council will certify the competencies.

The National Skills Qualifications Framework (NSQF) is based on outcomes referenced to the National Occupation Standards (NOSs), rather than inputs. The NSQF level descriptors, which are the learning outcomes for each level, include the process, professional knowledge, professional skills, core skills and responsibility. The assessment is to be undertaken to verify that individuals have the knowledge and skills needed to perform a particular job and that the learning programme undertaken has delivered education at a given standard. It should be closely linked to certification so that the individual and the employer could come to know the competencies acquired through the vocational subject or course. The assessment should be reliable, valid, flexible, convenient, cost effective and above all it should be fair and transparent. Standardized assessment tools should be used for assessment of knowledge of students. Necessary arrangements should be made for using technology in assessment of students.

KNOWLEDGE ASSESSMENT (THEORY)

Knowledge Assessment should include two components: one comprising of internal assessment and second an external examination, including theory examination to be conducted by the Board. The assessment tools shall contain components for testing the knowledge and application of knowledge. The knowledge test can be objective paper based test or short structured questions based on the content of the curriculum.

WRITTEN TEST

It allows candidates to demonstrate that they have the knowledge and understanding of a given topic. Theory question paper for the vocational subject should be prepared by the subject experts comprising group of experts of academicians, experts from existing vocational subject experts/teachers, subject experts from university/colleges or industry. The respective Sector Skill Council should be consulted by the Central/State Board for preparing the panel of experts for question paper setting and conducting the examinations.

The blue print for the question paper may be as follows:

Duration: 3 hrs

Max. Mark: 40

	Typology of Question	No. of Questions			Marks
		Very Short Answer (1 mark)	Short Answer (2 Marks)	Long Answer (3 Marks)	
1.	Remembering – (Knowledge based simple recall questions, to know specific facts, terms, concepts, principles, or theories; identify, define or recite, information)	3	2	2	13
2.	Understanding – (Comprehension – to be familiar with meaning and to understand conceptually, interpret, compare, contrast, explain, paraphrase, or interpret information)	2	3	2	14
3.	Application – (Use abstract information in concrete situation, to apply knowledge to new situations: Use given content to interpret a situation, provide an example, or solve a problem)	0	2	1	07
4.	High Order Thinking Skills – (Analysis & Synthesis – Classify, compare, contrast, or differentiate between different pieces of information; Organize and/ or integrate unique pieces of information from a variety of sources)	0	2	0	04
5.	Evaluation – (Appraise, judge, and/or justify the value or worth of a decision or outcome, or to predict outcomes based on values)	0	1	0	02
	Total	5x1=5	10x2=20	5x3=15	40 (20 questions)

SKILL ASSESSMENT (PRACTICAL)

Assessment of skills by the students should be done by the assessors/examiners on the basis of practical demonstration of skills by the candidate, using a competency checklist. The competency checklist should be developed as per the National Occupation Standards (NOSs) given in the Qualification Pack for the Job Role to bring about necessary consistency in the quality of assessment across different sectors and Institutions. The student has to demonstrate competency against the performance criteria defined in the National Occupation Standards and the assessment will indicate that they are 'competent', or are 'not yet competent'. The assessors assessing the skills of the students should possess a current experience in the industry and should have undergone an effective training in assessment principles and practices. The Sector Skill Councils should ensure that the assessors are provided with the training on the assessment of competencies.

Practical examination allows candidates to demonstrate that they have the knowledge and understanding of performing a task. This will include hands-on practical exam and viva voce. For practical, there should be a team of two evaluators – the subject teacher and the expert from the relevant industry certified by the Board or concerned Sector Skill Council. The same team of examiners will conduct the viva voce.

Project Work (individual or group project) is a great way to assess the practical skills on a certain time period or timeline. Project work should be given on the basis of the capability of the individual to perform the tasks or activities involved in the project. Projects should be discussed in the class and the teacher should periodically monitor the progress of the project and provide feedback for improvement and innovation. Field visits should be organised as part of the project work. Field visits can be followed by a small-group work/project

work. When the class returns from the field visit, each group might be asked to use the information that they have gathered to prepare presentations or reports of their observations. Project work should be assessed on the basis of practical file or student portfolio.

Student Portfolio is a compilation of documents that supports the candidate's claim of competence. Documents may include reports, articles, photos of products prepared by students in relation to the unit of competency.

Viva voce allows candidates to demonstrate communication skills and content knowledge. Audio or video recording can be done at the time of viva voce. The number of external examiners would be decided as per the existing norms of the Board and these norms should be suitably adopted/adapted as per the specific requirements of the vocational subject. Viva voce should also be conducted to obtain feedback on the student's experiences and learning during the project work/field visits.

5. UNIT CONTENTS

CLASS 11

Part A: Employability Skills

Sl. No.	Units	Duration (Hrs)
1.	Communication Skills – III	25
2.	Self-management Skills – III	25
3.	Information and Communication Technology Skills-III	20
4.	Entrepreneurial Skills – III	25
5.	Green Skills – III	15
	Total	110

Unit 1: Communication Skill – III			
Learning Outcome	Theory (10 hrs)	Practical (15 hrs)	Total Duration (25 Hrs)
1. Demonstrate knowledge of various methods of communication	1. Methods of communication - Verbal - Non-verbal - Visual	1. Writing pros and cons of written, verbal and non-verbal communication 2. Listing do's and don'ts for avoiding common body language mistakes	05
2. Identify specific communication styles	1. Communication styles- assertive, aggressive, passive-aggressive, submissive, etc.	1. Observing and sharing communication styles of friends, teachers and family members and adapting the best practices 2. Role plays on communication styles.	10
3. Demonstrate basic writing skills	1. Writing skills to the following: • Sentence • Phrase • Kinds of Sentences • Parts of Sentence • Parts of Speech • Articles • Construction of a Paragraph	1. Demonstration and practice of writing sentences and paragraphs on topics related to the subject	10
Total			25

Unit 2: Self-management Skills – III			
Learning Outcome	Theory (10 hrs)	Practical (15 hrs)	Total Duration (25 Hrs)
1. Demonstrate impressive appearance and grooming	<ol style="list-style-type: none"> Describe the importance of dressing appropriately, looking decent and positive body language Describe the term grooming Prepare a personal grooming checklist Describe the techniques of self- exploration 	<ol style="list-style-type: none"> Demonstration of impressive appearance and groomed personality Demonstration of the ability to self- explore 	10
2. Demonstrate team work skills	<ol style="list-style-type: none"> Describe the important factors that influence in team building Describe factors influencing team work 	<ol style="list-style-type: none"> Group discussion on qualities of a good team Group discussion on strategies that are adopted for team building and team work 	10
3. Apply time management strategies and techniques	<ol style="list-style-type: none"> Meaning and importance of time management – setting and prioritizing goals, creating a schedule, making lists of tasks, balancing work and leisure, using different optimization tools to break large tasks into smaller tasks. 	<ol style="list-style-type: none"> Game on time management Checklist preparation To-do-list preparation 	05
Total			25

Unit 3: Information & Communication Technology – III			
Learning Outcome	Theory (08 hrs)	Practical (12 hrs)	Total Duration (20 Hrs)
1. Create a document on word processor	<ol style="list-style-type: none"> Introduction to word processing. Software packages for word processing. Opening and exiting the word processor. Creating a document 	<ol style="list-style-type: none"> Demonstration and practice of the following: <ul style="list-style-type: none"> Listing the features of word processing Listing the software packages for word processing Opening and exit the word processor Creating a document 	10
2. Edit, save and print a document in word processor	<ol style="list-style-type: none"> Editing text Wrapping and aligning the text Font size, type and face. Header and Footer Auto correct Numbering and bullet Creating table Find and replace Page numbering. 	<ol style="list-style-type: none"> Demonstration and practising the following: <ul style="list-style-type: none"> Editing the text Word wrapping and alignment Changing font type, size and face Inserting header and footer Removing header 	10

	10. Printing document. 11. Saving a document in various formats.	and footer 2. Using autocorrect option 3. Insert page numbers and bullet 4. Save and print a document	
Total			20

Unit 4: Entrepreneurial Skills – III			
Learning Outcome	Theory (10 hrs)	Practical (15 hrs)	Total Duration (25 Hrs)
1. Describe the significance of entrepreneurial values and attitude	1. Values in general and entrepreneurial values 2. Entrepreneurial value orientation with respect to innovativeness, independence, outstanding performance and respect for work	1. Listing of entrepreneurial values by the students. 2. Group work on identification of entrepreneurial values and their roles after listing or reading 2-3 stories of successful entrepreneur 3. Exhibiting entrepreneurial values in Ice breaking, rapport building, group work and home assignments	10
2. Demonstrate the knowledge of attitudinal changes required to become an entrepreneur	1. Attitudes in general and entrepreneurial attitudes 2. Using imagination/ intuition 3. Tendency to take moderate risk 4. Enjoying freedom of expression and action 5. Looking for economic opportunities 6. Believing that we can change the environment 7. Analyzing situation and planning action 8. Involving in activity	1. Preparing a list of factors that influence attitude in general and entrepreneurial attitude 2. Demonstrating and identifying own entrepreneurial attitudes during the following micro lab activities like thematic appreciation test 3. Preparing a short write-up on "who am I" 4. Take up a product and suggest how its features can be improved 5. Group activity for suggesting brand names, names of enterprises, etc.	15
Total			25

Unit 5: Green Skills – III			
Learning Outcome	Theory (07 hrs)	Practical (08 hrs)	Total Duration (15 Hrs)
1. Describe importance of main sector of green economy	<ol style="list-style-type: none"> 1. Main sectors of green economy- E-waste management, green transportation, renewal energy, green construction, water management 2. Policy initiatives for greening economy in India 	<ol style="list-style-type: none"> 1. Preparing a poster on any one of the sectors of green economy 2. Writing a two-page essay on important initiatives taken in India for promoting green economy 	08
2. Describe the major green Sectors/Areas and the role of various stakeholder in green economy	<ol style="list-style-type: none"> 1. Stakeholders in green economy 2. Role of government and private agencies in greening cities, buildings, tourism, industry, transport, renewable energy, waste management, agriculture, water, forests and fisheries 	<ol style="list-style-type: none"> 1. Preparing posters on green Sectors/Areas: cities, buildings, tourism, industry, transport, renewable energy, waste management, agriculture, water, forests and fisheries 	07
Total			15

Part B: Vocational Skills

S. No.	Units	
1.	Introduction to Banking System and Mutual Fund	40
2.	Research on Mutual Fund Market	45
3.	Market and selling of Mutual Funds	40
4.	Purchase of Mutual Funds	40
Total		165

Unit 1: Introduction to Banking System and Mutual Fund			
Learning Outcome	Theory (15)	Practical (25)	Duration (40Hrs)
1. Describe the history and evolution of banking in India	1. Meaning of banking 2. Types of banking 3. History of banking 4. Recent trends in banking	1. Prepare a chart on types of banking 2. Prepare a presentation of history of banking	10
2. Explain the banking structure in India and types of banking.	1. Banking structure in India consisting of RBI, 2. Scheduled and non-scheduled banks, 3. Commercial banks, 4. Scheduled commercial banks 5. Public Sector Banks, 6. Private Sector Banks, 7. Foreign banks, 8. Regional Rural Banks, 9. Co-operative Banks	1. Prepare a chart on types of bank 2. Compare the functions of different category of banks.	10
3. Describe the Mutual fund	1. Meaning of Mutual fund 2. Types of mutual fund schemes and their characteristics and structure 3. Advantages and disadvantage of mutual fund 4. Factors influencing mutual fund performance 5. Laws and legal regulations relevant to mutual funds	1. Prepare a chart on mutual fund, types of schemes, advantages and disadvantage of mutual fund. 2. Prepare a presentation on laws and legal regulations relevant to mutual funds	08
4. Identify the role and responsibilities of mutual fund agent	1. Mutual fund agent 2. Role and responsibilities of Mutual fund agent 3. Guidelines for Mutual fund agent 4. Qualifications for becoming Mutual fund agent 5. Opportunities after completion of this course.	1. Demonstrate the role of mutual fund agent. 2. Prepare a chart on guidelines for mutual fund agent and qualification for becoming mutual fund agent.	12
Total			40

Unit 2: Research on Mutual Fund Market			
Learning Outcome	Theory (18)	Practical (27)	Duration (45 Hrs)
1. Analyzing mutual fund industry	1. Conduct research on mutual fund market <ul style="list-style-type: none"> - Top performing funds - Investor interest - Trends etc. 2. Features of top funds 3. Factors influencing top funds 4. Rank and compare performs of top funds with mutual funds offered by organizational 5. Register for regular stock market updates	1. Prepare a chart on research on mutual fund market 2. Make comparative chart on top funds with mutual funds offered by organizational	12
2. Describe mutual fund market	1. Trends in mutual fund markets 2. Inform customer about mutual fund market performance 3. Changes in scheme information 4. Norms of mutual fund industry	1. Demonstrate the different approaches to prospective customers through various methods	12
3. Update SEBI	1. Securities Exchange Board of India (SEBI) 2. Role of SEBI 3. Guidelines for mutual fund organizations	1. Make a chart on SEBI with guidelines for mutual fund organizations	10
4. Identifying customer profile	1. Research on potential customers 2. Ideal mutual fund schemes offered by organization 3. Basic profile of target customers as per research 4. Methods to evaluate mutual fund schemes	1. Draw the format of customer information system 2. Prepare a format for the periodic report on the status of acquired customer	11
Total			45

Unit 3: Marketing of Mutual Funds			
Learning Outcome	Theory (15)	Practical (25)	Duration (40 Hrs)
1. Approach mutual fund customer	1. Approach the customers based on leads 2. Sources of lead <ul style="list-style-type: none"> - Supervisor/manager - Referral network - Secondary data 3. Respond to customer who approach organization to purchase MF 4. Prospective customers on mutual fund	1. Demonstrate how to respond the customer who approaches organization 2. Prepare a chart on functioning of mutual fund market regarding prospective customers	10

	5. Functioning of mutual fund market regarding prospective customers		
2. Map the customers goals	<ol style="list-style-type: none"> 1. Inform the investor on schemes and products offered by organization 2. Use of market analysis to know about <ul style="list-style-type: none"> - Market trends - Mutual fund market 3. Financial goals of customers 4. Needs and financial requirement of prospective customers 5. Map the prospective customers' goal with schemes 6. Mutual fund schemes their benefits and success factors 7. Past and project performance of mutual fund schemes 	<ol style="list-style-type: none"> 1. Demonstrate how to inform the investor on schemes and products offered by organization 2. Draw a chart on financial goals of customers 3. Make a poster on mutual fund schemes their benefits and success factors 	10
3. Conduct risk profiling of prospective customers	<ol style="list-style-type: none"> 1. Risk profiling of prospective customers 2. Schemes including risk level of the investment 3. Dividends and other payment receivables 4. Brochures and documents outlining MFS 5. Investment approach and risk control 6. Terms and conditions of MF and commission received for schemes 7. Circumstances and implication in the case of early termination 8. Process of purchasing MF 	<ol style="list-style-type: none"> 1. Demonstrate how to analysis the risk profiling of prospective customers 2. Draw a chart on terms and conditions of MF 3. Process of mutual funds purchase 	12
4. Meeting sales and revenue targets	<ol style="list-style-type: none"> 1. Report on selling of MF 2. Submit the report to supervisor 3. Report on number of leads convert into sales 4. Update sales and revenue targets 	<ol style="list-style-type: none"> 1. Prepare a chart on selling of MF and number of leads convert into sales 	08
Total			40

Unit 4: Mutual Funds Buying			
Learning Outcome	Theory (15)	Practical (25)	Duration (40Hours)
1. Assisting customers in documentation	<ol style="list-style-type: none"> 1. Customers form for purchase of mutual fund 2. Filling required form 3. Document for processing the MF purchase 	<ol style="list-style-type: none"> 1. Delivery of required document to bank through role play 	07

2. Process of payment to purchase Mutual Fund	<ol style="list-style-type: none"> 1. Payment process 2. Accepted payment process 3. Collection of payment through various channels <ul style="list-style-type: none"> - Demand draft - Online transfer 	<ol style="list-style-type: none"> 1. Demonstration on informing customer about acceptance or rejection of applications 	13
3. Acknowledge the customers	<ol style="list-style-type: none"> 1. Acknowledgement of application and payment receipt 2. Importance of acknowledgement receipt 3. Notification from processing team regarding successful payment 4. Resolve any issues in case of rejection of payment 	<ol style="list-style-type: none"> 1. Demonstrate how mutual fund agent handover the acknowledgement receipt to client 2. Prepare a chart on format of acknowledgement receipt 	10
4. Follow up with customers	<ol style="list-style-type: none"> 1. Prepare and submit the reports on selling of MF 2. Mutual fund certificate 3. Purchase history 4. Investor information system 5. Periodic follow up sessions with customers 	<ol style="list-style-type: none"> 1. Prepare a periodic report format on selling of mutual fund 2. Draw a chart containing the format of mutual fund certificate 	10
Total			40

CLASS 12

Part A: Employability Skills

Sl. No.	Units	Duration (Hrs)
1.	Communication Skills – IV	25
2.	Self-management Skills – IV	25
3.	Information and Communication Technology Skills-IV	20
4.	Entrepreneurial Skills – IV	25
5.	Green Skills – IV	15
	Total	110

Unit 1: Communication Skills – IV			
Learning Outcome	Theory (10 hrs)	Practical (15 hrs)	Total Duration (25 Hrs)
1. Describe the steps to active listening skills	1. Importance of active listening at workplace 2. Steps to active listening	1. Demonstration of the key aspects of becoming active listener 2. Preparing posters of steps for active listening	10
2. Demonstrate basic writing skills	2. Writing skills to the following: <ul style="list-style-type: none"> • Sentence • Phrase • Kinds of Sentences • Parts of Sentence • Parts of Speech • Articles • Construction of a Paragraph 	1. Demonstration and practice of writing sentences and paragraphs on topics related to the subject	15
Total			25

Unit 2: Self-management Skills –IV			
Learning Outcome	Theory (10 hrs)	Practical (15 hrs)	Total Duration (25 Hrs)
1. Describe the various factors influencing self-motivation	1. Finding and listing motives (needs and desires); 2. Finding sources of motivation and inspiration (music, books, activities); expansive thoughts; living fully in the present moment; dreaming big	1. Group discussion on identifying needs and desire 2. Discussion on sources of motivation and inspiration	10
2. Describe the basic personality traits, types and disorders	1. Describe the meaning of personality 2. Describe how personality influence others 3. Describe basic personality	1. Demonstrate the knowledge of different personality types	15

	traits 4. Describe common personality disorders- paranoid, antisocial, schizoid, borderline, narcissistic, avoidant, dependent and obsessive		
Total			25

Unit 3: Information & Communication Technology Skills - IV			
Learning Outcome	Theory (08 hrs)	Practical (12 hrs)	Total Duration (20 Hrs)
1. Perform tabulation using spreadsheet application	<ol style="list-style-type: none"> 1. Introduction to spreadsheet application 2. Spreadsheet applications 3. Creating a new worksheet 4. Opening workbook and entering text 5. Resizing fonts and styles 6. Copying and moving 7. Filter and sorting 8. Formulas and functions 9. Password protection. 10. Printing a spreadsheet. 11. Saving a spreadsheet in various formats. 	<ol style="list-style-type: none"> 1. Demonstration and practice on the following: <ul style="list-style-type: none"> • Introduction to the spreadsheet application • Listing the spreadsheet applications • Creating a new worksheet • Opening the workbook and enter text • Resizing fonts and styles • Copying and move the cell data • Sorting and Filter the data • Applying elementary formulas and functions • Protecting the spreadsheet with password • Printing a spreadsheet • Saving the spreadsheet in various formats. 	10
2. Prepare presentation using presentation application	<ol style="list-style-type: none"> 1. Introduction to presentation 2. Software packages for presentation 3. Creating a new presentation 4. Adding a slide 5. Deleting a slide 6. Entering and editing text 7. Formatting text 8. Inserting clipart and images 9. Slide layout 10. Saving a presentation 11. Printing a presentation 	<ol style="list-style-type: none"> 1. Demonstration and practice on the following: <ul style="list-style-type: none"> • Listing the software packages for presentation • Explaining the features of presentation • Creating a new presentation • Adding a slide to presentation. • Deleting a slide • Entering and edit text • Formatting text 	10

	document.	<ul style="list-style-type: none"> • Inserting clipart and images • Sliding layout • Saving a presentation • Printing a presentation document 	
Total			20

Unit 4: Entrepreneurial Skills – IV			
Learning Outcome	Theory (10 hrs)	Practical (15 hrs)	Total Duration (25 Hrs)
1. Identify the general and entrepreneurial behavioural competencies	<ol style="list-style-type: none"> 1. Barriers to becoming entrepreneur 2. Behavioural and entrepreneurial competencies – adaptability/decisiveness, initiative/perseverance, interpersonal skills, organizational skills, stress management, valuing service and diversity 	<ol style="list-style-type: none"> 1. Administering self-rating questionnaire and score responses on each of the competencies 2. Collect small story/ anecdote of prominent successful entrepreneurs 3. Identify entrepreneurial competencies reflected in each story and connect it to the definition of behavioural competencies 4. Preparation of competencies profile of students 	10
2. Demonstrate the knowledge of self-assessment of behavioural competencies	<ol style="list-style-type: none"> 1. Entrepreneurial competencies in particular: self-confidence, initiative, seeing and acting on opportunities, concern for quality, goal setting and risk taking, problem solving and creativity, systematic planning and efficiency, information seeking, persistence, influencing and negotiating, team building 	<ol style="list-style-type: none"> 1. Games and exercises on changing entrepreneurial behaviour and development of competencies for enhancing self-confidence, problem solving, goal setting, information seeking, team building and creativity 	15
Total			25

Unit 5: Green Skills – IV			
Learning Outcome	Theory (05 hrs)	Practical (10 hrs)	Total Duration (15 Hrs)
1. Identify the role and importance of	<ol style="list-style-type: none"> 1. Role of green jobs in toxin-free homes, 2. Green organic 	<ol style="list-style-type: none"> 1. Listing of green jobs and preparation of posters on green job profiles 	

<p>green jobs in different sectors</p>	<p>gardening, public transport and energy conservation,</p> <ol style="list-style-type: none"> 3. Green jobs in water conservation 4. Green jobs in solar and wind power, waste reduction, reuse and recycling of wastes, 5. Green jobs in green tourism 6. Green jobs in building and construction 7. Green jobs in appropriate technology 8. Role of green jobs in Improving energy and raw materials use 9. Role of green jobs in limiting greenhouse gas emissions 10. Role of green jobs minimizing waste and pollution 11. Role of green jobs in protecting and restoring ecosystems 12. Role of green jobs in support adaptation to the effects of climate change 	<p>2. Prepare posters on green jobs.</p>	<p>15</p>
<p>Total</p>			<p>15</p>

Part B: Vocational Skills

S. No.	Units	Duration (Hrs)
1.	Post Sales Services in Mutual Fund	40
2.	Banking Services to Mutual Fund customers	45
3.	Customer Centric Service Orientation	40
4.	Integrity, Banking Ethics and Team Work	40
Total		165

Unit 1: Post Sales Services in Mutual Fund			
Learning Outcome	Theory (18 Hrs)	Practical (22 Hrs)	Duration (40 Hrs)
1. Build relationship with customer	<ol style="list-style-type: none"> 1. Customer relationship management 2. Factors affecting to maintain long term relationship with customers 3. Build and maintain long-term relationships with customers 4. Plan and execute regular follow-up visits with customers 	<ol style="list-style-type: none"> 1. Prepare chart on CRM and also discuss the factors affecting customer long term relationship 2. Demonstrate how to deal with customer to build CRM 	12
2. Respond to customer queries related to MF	<ol style="list-style-type: none"> 1. Customers queries related to mutual fund 2. Types of customer queries 3. Respond to any customer queries 4. Inform customers of any change in performances 	<ol style="list-style-type: none"> 1. Prepare a chart on types of customers queries 2. Demonstrate how to respond customer queries. 	8
3. Provide post-sale service to customers	<ol style="list-style-type: none"> 1. Meaning of post-sale service 2. Importance of post-sale service 3. Post-sale services are <ul style="list-style-type: none"> - Delivering forms for change of address - Delivering payments - Setting up automatic updates 4. Maintain shareholder account with updates 	<ol style="list-style-type: none"> 1. Prepare a chart on types of post-sale services provide to customer 2. Demonstrate the post-sale services to the customers through role play 	8
4. Re-map the customer requirement	<ol style="list-style-type: none"> 1. Customer requirement 2. Types of customer requirements 3. Re-map customer requirements according to their current financial status 4. Managing customer risk 	<ol style="list-style-type: none"> 1. Prepare a chart on the customer requirements and its type 2. Demonstrate how to re-map customer requirements according to their financial status 	12
Total			40

Unit 2: Termination of Mutual Fund			
Learning Outcome	Theory (20 Hrs)	Practical (25 Hrs)	Duration (45 Hrs)
1. Describe the termination of mutual fund	<ol style="list-style-type: none"> 1. Meaning of termination 2. Termination of mutual fund 3. Reasons of termination 4. Who can terminate the mutual fund 5. Condition of termination 	<ol style="list-style-type: none"> 1. Prepare a chart containing termination of mutual fund 2. Demonstrate the post sale service 	12
2. Assist in termination process	<ol style="list-style-type: none"> 1. Assist customer in the termination of mutual fund 2. Termination process of mutual fund 3. Submit the termination request 4. Documents required for termination of mutual fund 	<ol style="list-style-type: none"> 1. Demonstrate the process of termination of mutual fund 2. List out the required documents for the termination of mutual fund 3. Demonstrate how to inform and advice customers about the termination of mutual fund 	10
3. Process of payment	<ol style="list-style-type: none"> 1. Process of cancellation of mutual fund certificate upon termination 2. Process of payments when mutual fund is complete 3. Customers options on completion of mutual fund 4. Payment process in different conditions of mutual funds 	<ol style="list-style-type: none"> 1. Conduct a role play and showing process of cancellation of mutual fund certificate upon termination 2. Demonstrate how to inform and advice customers about the different option of payment in termination of mutual fund 	13
4. Prepare report on termination	<ol style="list-style-type: none"> 1. Termination report 2. Main elements of termination report 3. Report on status of funds held by customers 	<ol style="list-style-type: none"> 1. Prepare a chart on termination process 	10
Total			45

Unit 3: Customer Centric Service			
Learning Outcome	Theory (18 Hrs)	Practical (22 Hrs)	Duration (40 Hrs)
1. Communicate with BFSI customer and colleagues	<ol style="list-style-type: none"> 1. Communication 2. Communication skills <ul style="list-style-type: none"> - Listening - Speaking - Personal presentation 3. Address escalated 	<ol style="list-style-type: none"> 1. Demonstrate the communication skills through role play 2. Importance of body language and its impact on communication 	10

	4. customer concerns Educate colleagues on good practices in customer handling		
2. Teach sensitivity in behaviour	1. Sensitivity towards - Language - Gender - Cultural - Social factors 2. Social differences - Customers - Superior - Colleagues	1. Demonstrate the sensitive behaviour as per language, gender and cultural 2. Prepare a chart on social difference through picture presentation	10
3. Communicate work output	1. Communication at work place 2. Training of staff to achieve share goals - Cooperative - Coordinate - Collaborate 3. Train staff to gain customer loyalty and satisfactions 4. Deal with irate customers	1. Demonstrate the communication skills at work place 2. Demonstrate how to deal with irate customers through role play	8
4. Maintain service orientation	1. Feedback and its features 2. Organise regular feedback collection as per company's SOP 3. Address problems by quick decision making 4. Promote clarity, honesty and transparency in dealing with customers and colleague 5. Educate team in adverse consequences for avoid mis-selling and misinformation 6. Enhancing brand value of company through superior customer service	1. Demonstrate how to organise regular feedback collection as per company policy 2. Demonstrate how to educate team in adverse consequences for avoid mis-selling and misinformation	12
Total			40

Unit 4: Integrity, Banking Ethics and Team Work

Learning Outcome	Theory (18 Hrs)	Practical (22 Hrs)	Duration (40 Hrs)
1. Maintain the Integrity of banking transactions	1. Banking Integrity 2. Unfair trades 3. Corrupts practices 4. Refrain from indulging in unfair or corrupt	1. Demonstrate the unfair and corrupt practices in banking 2. Prepare a format to maintain the records	08

	<p>practices.</p> <ol style="list-style-type: none"> 5. Maintain records as per company policy 6. Avoid using company's fund for personal use 	as per company policy	
2. Maintaining data security as per company policy	<ol style="list-style-type: none"> 1. Customer information 2. Protection of customer information 3. RBI rules for protection of customer information 4. Avoid IP infringement 5. Rules for transparent dealing with customer 6. Regulation for transparent dealing with customers 	<ol style="list-style-type: none"> 1. Prepare a chart on RBI rules for protection of customer information 2. Demonstrate the transparent dealing with customer 	10
3. Practising ethical behaviour	<ol style="list-style-type: none"> 1. Avoid misrepresentation of misinformation 2. Practices of ethical behaviour with -Customers -Colleagues 3. Avoid defaming products and service of companies in competition 4. Consult supervisor in differentiating between ethical and unethical practices 	<ol style="list-style-type: none"> 1. Demonstrate the ways to avoid misrepresentation of information 2. Demonstrate and practices ethical ways to in day to day processes and dealing with customers and colleagues 	12
4. Developing healthy team climate	<ol style="list-style-type: none"> 1. Team work and its features 2. Develop healthy team environment 3. Build mutual trust 4. Factors to keep in mind to build mutual trust 5. Exchange, defend and rethink of ideas 6. Support team members work 7. Group decision making 8. Deal with productivity with conflict 	<ol style="list-style-type: none"> 1. Prepare a chart on factors to keep in mind to build mutual trust 2. Prepare a chart on Group decision making 3. Demonstrate how to deal with conflict to improve with productivity 4. Demonstrate support to team members to accomplish goals. 	10
Total			40

6. ORGANISATION OF FIELD VISITS

In a year, at least 3 field visits/educational tours should be organised for the students to expose them to the activities in the workplace.

Visit a Bank/organization/SHGs/Peer Group engaged in /financial activities/microfinance and observe the following:

Documentation, conversation, process proposals filing procedure, requirement of document for loan specially the needs of rural people etc. During the visit, students should also obtain the following information/forms from the officials of Bank/organization:

1. List of require document for loan
2. Blank form of different types of loan
3. List of sequence of document
4. Hope/expectations of people from Business Correspondent

7. LIST OF EQUIPMENT AND MATERIALS

The list given below is suggestive and an exhaustive list should be prepared by the vocational teacher. Only basic tools, equipment and accessories should be procured by the Institution so that the routine tasks can be performed by the students regularly for practice and acquiring adequate practical experience.

Material Required for Store Operations Assistant

1. White board marker
2. Overhead projector
3. Laptop/Desktop
4. Internet access
5. Money Currency Counting Machine with Built-In-Fake Note Detector
6. Scanner
7. Multimedia Projector
8. Projector Screen

8. VOCATIONAL TEACHER'S/ TRAINER'S QUALIFICATION AND GUIDELINES

Qualification and other requirements for appointment of vocational teachers/trainers on contractual basis should be decided by the State/UT. The suggestive qualifications and minimum competencies for the vocational teacher should be as follows:

Sl. No.	Qualification	Minimum Competencies	Age Limit
1.	Post-graduation in commerce/ management/ finance from a recognized institute/university, with at least one year work experience	<ul style="list-style-type: none"> • Effective communication skills (oral and written) • Basic computing skills. • Technical competencies 	18-37 years Age relaxation to be provided as per Govt. rules.

Vocational Teachers/Trainers form the backbone of Vocational Education being imparted as an integral part of Samagra Shiksha Abhiyan (SSA). They are directly involved in teaching of vocational subjects and also serve as a link between the industry and the schools for arranging industry visits, On-the-Job Training (OJT) and placement.

These guidelines have been prepared with an aim to help and guide the States in engaging quality Vocational Teachers/Trainers in the schools. Various parameters that need to be looked into while engaging the Vocational Teachers/Trainers are mode and procedure of selection of Vocational Teachers/Trainers, Educational Qualifications, Industry Experience, and Certification/Accreditation.

The State may engage Vocational Teachers/Trainers in schools approved under the component of Vocationalisation of Secondary and Higher Secondary Education under RMSA in the following ways:

- (i) directly as per the prescribed qualifications and industry experience suggested by the PSS Central Institute of Vocational Education(PSSCIVE), NCERT or the respective Sector Skill Council(SSC)

OR

- (ii) Through accredited Vocational Training Providers accredited under the National Quality Assurance Framework (NQAF*) approved by the National Skill Qualification Committee on 21.07.2016. If the State is engaging Vocational Teachers/Trainers through the Vocational Training Provider (VTP), it should ensure that VTP should have been accredited at NQAF Level 2 or higher.

* *The National Quality Assurance Framework (NQAF) provides the benchmarks or quality criteria which the different organisations involved in education and training must meet in order to be accredited by competent bodies to provide government-funded education and training/skills activities. This is applicable to all organizations offering NSQF-compliant qualifications.*

The educational qualifications required for being a Vocational Teacher/Trainer for a particular job role are clearly mentioned in the curriculum for the particular NSQF compliant job role. The State should ensure that teachers / trainers deployed in the schools have relevant technical competencies for the NSQF qualification being delivered. The Vocational Teachers/Trainers preferably should be certified by the concerned Sector Skill Council for the particular Qualification Pack/Job role which he will be teaching. Copies of relevant certificates and/or record of experience of the teacher/trainer in the industry should be kept as record.

To ensure the quality of the Vocational Teachers/Trainers, the State should ensure that a standardized procedure for selection of Vocational Teachers/Trainers is followed. The selection procedure should consist of the following:

- (i) Written test for the technical/domain specific knowledge related to the sector;
- (ii) Interview for assessing the knowledge, interests and aptitude of trainer through a panel of experts from the field and state representatives; and
- (iii) Practical test/mock test in classroom/workshop/laboratory.

In case of appointment through VTPs, the selection may be done based on the above procedure by a committee having representatives of both the State Government and the VTP.

The State should ensure that the Vocational Teachers/Trainers who are recruited should undergo induction training of 20 days for understanding the scheme, NSQF framework and Vocational Pedagogy before being deployed in the schools.

The State should ensure that the existing trainers undergo in-service training of 5 days every year to make them aware of the relevant and new techniques/approaches in their sector and understand the latest trends and policy reforms in vocational education.

The Head Master/Principal of the school where the scheme is being implemented should facilitate and ensure that the Vocational Teachers/Trainers:

- (i) Prepare session plans and deliver sessions which have a clear and relevant purpose and which engage the students;
- (ii) Deliver education and training activities to students, based on the curriculum to achieve the learning outcomes;
- (iii) Make effective use of learning aids and ICT tools during the classroom sessions;
- (iv) Engage students in learning activities, which include a mix of different methodologies, such as project based work, team work, practical and simulation based learning experiences;
- (v) Work with the institution's management to organise skill demonstrations, site visits, on-job trainings, and presentations for students in cooperation with industry, enterprises and other workplaces;
- (vi) Identify the weaknesses of students and assist them in up gradation of competency;
- (vii) Cater to different learning styles and level of ability of students;
- (viii) Assess the learning needs and abilities, when working with students with different abilities
- (ix) Identify any additional support the student may need and help to make special arrangements for that support;
- (x) Provide placement assistance

Assessment and evaluation of Vocational Teachers/Trainers is very critical for making them aware of their performance and for suggesting corrective actions. The States/UTs should ensure that the performance of the Vocational Teachers/Trainers is appraised annually. Performance based appraisal in relation to certain pre-established criteria and objectives should be done periodically to ensure the quality of the Vocational Teachers/Trainers. Following parameters may be considered during the appraisal process:

1. Participation in guidance and counseling activities conducted at Institutional, District and State level;
2. Adoption of innovative teaching and training methods;
3. Improvement in result of vocational students of Class X or Class XII;
4. Continuous up gradation of knowledge and skills related to the vocational pedagogy, communication skills and vocational subject;
5. Membership of professional society at District, State, Regional, National and International level;
6. Development of teaching-learning materials in the subject area;
7. Efforts made in developing linkages with the Industry/Establishments;
8. Efforts made towards involving the local community in Vocational Education
9. Publication of papers in National and International Journals;
10. Organisation of activities for promotion of vocational subjects;
11. Involvement in placement of students/student support services.

9. LIST OF CONTRIBUTORS

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