



# mutual fund



NSDC  
Certification

4.8 ★



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# about the course

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end-to-end course on mutual funds. we will cover everything from the basics of mutual funds to how you can research on your own to find the best mutual funds that suit you.

## what will you get?

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- ▶ understand the basics of mutual funds and the stock market.
- ▶ types of mutual funds and the purpose of each.
- ▶ how to research funds, tools to do it.
- ▶ compare different investment options and understand which suits you best.

# who is this course for

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beginners in investing

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retail investors

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entrepreneurs & business owners

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retirees or senior citizens

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working professionals

# what will you learn? / course outcome

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## build a strong investment portfolio

learn how to select the best mutual funds and diversify your investments effectively.

## master mutual fund research

gain hands-on experience in evaluating mutual funds using both quantitative and qualitative metrics.

## develop smart investment strategies

understand key strategies like sip, swp, & tax harvesting to maximize your returns.

## understand risk management

learn how to assess and mitigate risks while investing in mutual funds to safeguard your wealth.

# course **features**

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recorded video classes

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assignments and quiz

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PDF notes

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live interactive section

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community supports

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doubt clearance

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## certifications

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NSDC  
Certification



ENTRI Course  
Completion  
Certification

# your path to success

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access  
recorded classes



learn at your own pace with  
well-structured lessons.

join live  
interactive sessions



engage with experts  
& resolve doubts in real-time.

practice



strengthen your skills  
through hands-on exercises.

become a pro  
mutual fund investor!



master investment strategies  
& make confident decisions

# key topics covered

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- background and orientation
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- intro to personal finance
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- what is a mutual fund?
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- types of mutual funds, returns calculations
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- how to choose a MF: quantitative
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- how to choose a MF: qualitative
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- how to identify red flags in a mutual fund!
- 

- tools to evaluate mutual funds
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- tax on mutual funds



# course syllabus

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## why savings is not enough? why should you invest!

1. importance of building an investing habit
2. time value of money, retirement planning, inflation

## the concept of compounding

1. explaining the only concept we need to understand to make money

## options to invest:

1. evaluate the different investment options we have: FD, RD, gold, real estate MF, stocks, crypto etc
2. understand the risks and advantages of each

## what is a mutual fund? and types.

1. basics of mutual fund
2. types of mutual funds
3. subcategories of each mutual fund types

## how are returns calculated?

1. different ways to calculate returns and the purpose of each
2. helps you make wise judgements



## how to choose a MF: quantitative

1. critical metrics to study a mutual funds

## how to choose a MF: qualitative

1. important qualitative metrics to study a MF

## how do we diversify and rebalance?

1. goal-based investing

## strategies to follow

1. SIP, SWP, STP, 5% opportunity fund
2. tax harvesting

## extras

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- ▶ how to identify red flags in a mutual fund!
- ▶ various tools for mutual fund research
- ▶ tax on mutual funds

# our mentor

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aswin p s

- ▷ a certified mutual fund distributor. ARN: 267831
- ▷ finance educator/ content creator with 130k+ followers on instagram
- ▷ long term investor in the stock market and mutual funds



# about **entri** app

entri is india's fastest-growing local language learning app for job skills with over 9 m users. however, what makes entri truly unique is its devoted focus on the future generation.

entri coaches aspirants on a variety of upskilling courses from all backgrounds. major courses include coding, digital marketing, spoken english, finance etc. in the finance segment, we have courses from india's best share trading experts and industrial leaders such as manu bhatia, abid hassan, rajesh e a and nagaraj b.



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