



Institute of  
Business Administration  
Karachi

*Leadership and Ideas for Tomorrow*

IBA CEE

Center for Executive Education  
Institute of Business Administration

# FINANCIAL SKILLS SET

## **Module 1: Financial Product Development**

September 24 - October 17, 2018 | Monday & Wednesday |  
6:30 PM to 8:30pm

## **Module 2: Accounting Standard & Techniques**

October 22 - November 14, 2018 | Monday & Wednesday |  
6:30 PM to 8:30pm

## **Module 3: Marketing for Financial Services**

November 19 - December 12, 2018 | Monday & Wednesday |  
6:30 PM to 8:30pm

## **Module 4: Selling Strategies for Mutual Funds**

December 17 -19, 2018 | Monday & Wednesday |  
9:00 AM to 5:00pm

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### **Discount Package:**

Package 1: Choose any one course: PKR 16,000/-

Package 2: Choose any two courses: PKR 30,400/- (PKR 15,200 each)

Package 3: Choose any three courses: PKR 43,200/- (PKR 14,400 each)

Package 4: Choose complete package: PKR 54,800/- (PKR 13,700 each)

*Training investment includes best hands-on training, training manual, exercise files, case studies, stationery & business networking.*

Registration form and Fee Voucher are available at our website: <http://sdp.iba.edu.pk/>

Fee is to be deposited in cash / pay order in any branch of FAYSAL BANK Ltd., A/C No. 110-2162113-006. No fee will be accepted in cash/cheque at our office.

# FINANCIAL PRODUCT DEVELOPMENT

September 24-October 17, 2018 |  
Monday & Wednesday | 6:30 pm to 8:30 pm

## OVERVIEW:

New product development in financial sector is the need of emerging economies. Pakistan having both conventional as well as Shariah compliant products has got huge potential to explore. Considering the fact this course is designed to nurture the skills required for core financial understanding and architect the solution accordingly. Moreover, comparative analysis of alternate within the same economy as well as in the region will be convenient.

## LEARNING OUTCOMES:

- Need analysis
- Understanding financial regulations
- Comparison amongst the alternatives
- Extendibility of the business model

## BENEFITS:

- Facilitate future planning and decision making
- Accessibility to financial resources
- First mover advantage



## FOCUS AREA:

- Product term sheet
- Return Calculation
- Prudential regulations
- NBFC rules
- Product Feasibility
- Product Model

## KEY FEATURES:

- Product Design
- Competitor Analysis
- Regulatory Framework
- Financial Model

# Module

# 1



# Accounting Standards & Techniques

October 22-November 14, 2018 |  
Monday & Wednesday | 6:30 pm to 8:30 pm

## OVERVIEW:

This course is designed to develop the skills required for financial valuation and representations of businesses with the help of accounting standards. These tools can be capitalized to design project feasibility. Moreover, comparison of competitors within the same sector as well as in the region will be convenient. It will facilitate the participants to develop the understanding of how to get work done through employee delegation while capitalizing on financial figures tracking capabilities.

## LEARNING OUTCOMES:

- Understanding financial presentations
- Monitor targeted benchmarks
- Delegate responsibilities with measurable outcomes

## BENEFITS:

- Appropriate representation of the businesses
- Facilitate future planning and decision making
- Comparisons made easy
- Performance review under various possible scenarios



## FOCUS AREA:

- Presentation of Financial Statements
- Cash Flows based planning
- Impairment of Assets
- Intangible Assets
- Consolidated Financial Statements
- Investments valuation

## KEY FEATURES:

- Budget preparation
- Liquidity management
- Fair value calculation
- Related party interest
- Joint ventures
- Financial Instruments

# Module

# 2

# Marketing for Financial Services

November 19-December 12, 2018 |  
Monday & Wednesday | 6:30 pm to 8:30 pm

## OVERVIEW:

The objective of this course is to familiarize the applicants with the basic concepts of marketing, its scope and application in the corporate arena specifically in banks. Concepts of brand equity, marketing management and customer relationship management are discussed in detail. Also, information on developing the marketing mix, distribution of products and logistics management is covered. Primarily this course aims to provide an in-depth appreciation and understanding of the unique challenges inherent in managing and delivering quality services.

## BENEFITS:

- Media representation rules
- Need Analysis
- Comparisons of conventional product vs. financial services marketing
- Concept of brand equity

## FOCUS AREA:

- Marketing Research
- Marketing Strategy
- Service Differentiation
- Competitive Strategies
- Pricing Strategy
- Distribution Networks
- Direct & Personal Selling
- Sales through CRM
- Regulatory framework of financial services marketing
- Social Responsibility

## LEARNING OUTCOMES:

- Develop effective marketing strategies for financial services
- Well versed with the concept of brand equity & management
- Effectively utilize the concepts of CRM for marketing success
- working knowledge of Marketing Research concepts, its application and importance



# Module

# 3

## KEY FEATURES:

- Concept of financial services marketing
- Social responsibility marketing
- Marketing regulations
- Marketing research
- Customer relationship management

# Selling Strategies for Mutual Funds

December 17 & 19, 2018 |  
Monday & Wednesday | 9:00 am to 5:00 pm

## OVERVIEW:

The objective of this course is to familiarize the applicants with the basic concepts pool of investments, its investment strategies, regulatory mechanism and ethical selling tactics. It evolves around the risk assessment of investors and asset liability matching principle. Investors profiling, timings of entry into the funds as well as it's exist plan will be discussed in details. Various categories of assets underlying the funds will be elaborated in order to expose the sellers of units.

## LEARNING OUTCOMES:

- Be well versed with the concept of various categories of funds.
- Be able to effectively utilize the concept of assets and liability matching principle.
- Tax mechanism and credit affiliated with funds.
- Planning for entry and exist of funds.
- Aggressive, moderate and conservative investment plan options.

## BENEFITS:

- Investor protection
- Tax liability evaluation
- Consistent income resources
- Alternate investment plan
- Income diversification



## FOCUS AREA:

- Concept of Mutual Funds
- Regulatory Framework
- Pension Funds
- Risk Disclosure
- Investment Plan

## KEY FEATURES:

- Risk & return assessment
- Concept of mutual funds marketing
- Retirement plan and pension funds
- Rules regarding funds sales

# Module

# 4



## **TRAINERS' PROFILE:**

### **Mohsin Adhi**

**Mohsin Adhi** is a Corporate Trainer having expertise in Finance and Entrepreneurship domains specifically in Financial Analysis, Investments and Risk Management and Management Development in SME sector. Moreover, he has been associated for last 8 years with different universities as an adjunct faculty member teaching mainly Portfolio Investments, Corporate Finance, Analysis of Financial Statements and other key financial courses.

Mohsin is associated with the Institute of Business Administrations as visiting faculty and trainer. He has conducted various open enrollment and customized trainings at IBA on topics such as Analysis of Financial Statements, Business Valuations, Financial Management, Corporate Finance, etc.

Amongst his diverse business exposure, he has established and led successfully an institute in Karachi producing more than 2,000 alumni. In addition to that, he has exposure of the lubricants industry where he has served as a leading partner of a lubricants distribution company having offices both in Pakistan and UAE. Furthermore, Mr. Adhi has been office bearer of Memon Professional Forum and Toastmasters International Karachi. He has contributed as a core member of New Product Development Committee of Pakistan Stock Exchange Ltd. (formally, Karachi Stock Exchange).

At present, he is engaged with an Investment Management Company named Alfa Adhi Securities (Pvt) Ltd. having a Corporate Brokerage House for both Equities as well as Commodities trading. This company has associate enterprise serving Pakistani market with its admirable educational toys distribution network; and extending its services in the UK market by offering traditional Pakistani cloths. Along with these avenues, he is also involved in the corporate trainings having clientele from leading organizations like SECMC, Meezan Bank, BankIslami and many more.

The educational qualification comprises of MSc in Finance and Financial Law from University of London MBA in Finance from Bahria Univeristy. In order to give practical exposure to the students at university level, he has conducted various guest speaker sessions and seminars to divert his knowledge to the forthcoming business leaders.

## **Faraz Younus Bandukda**

**Faraz Younus Bandukda** is a seasoned trainer in the field of Finance specializing in financial modeling and Islamic Finance. Further, he is currently an adjunct faculty member at different universities teaching Islamic Finance, Entrepreneurship and other Finance & Economics courses.

Faraz has remained on the board of directors of various organizations including Fortune Investments (PVT.) Limited, Fortune Solutions (PVT.) Limited and Pakistan Synthetics Limited. He is also part of the standing committee on Islamic Banking and Finance formed at the Federation of Chamber of Commerce and Industry (FPCCI). He also enjoys a membership of the Islamic Capital Markets Development committee of the Karachi Stock Exchange formed in association with Al Meezan Investments and Fortune Islamic Services.

Faraz Younus Bandukda, an entrepreneurial evangelist, is currently the Chief Executive at Al Hilal Shariah Advisors (Pvt.) Limited, providing Islamic Business support services in the field of trade, finance, halaal certification and wealth management. Faraz has to his credit, development and launch of the very first Islamic Equity Brokerage house in Pakistan by the name of Fortune Kaamil.

He has done his Masters in business administration from Institute of Business Administration (IBA), Karachi and holds a bachelor's degree in computer science from FAST-NU. He is also a CFA level III candidate from the CFA Institute, USA and has an Islamic finance certification from Centre for Islamic Economics (CIE), a division of Jamia Dar ul Uloom, Karachi. Currently Faraz is also pursuing Islamic Finance Qualification (IFQ) from the Securities and Investments Institute, UK. He is also certified for the Directors certification training program from University of Lahore and has completed his Institute of Capital Markets certifications.

At the Center for Executive Education IBA, Faraz conducts corporate trainings on the topics of Marketing Financial Services, Finance Boot Camp & Use of MS Excel in Finance.