

## **BOOT CAMP SCHEDULE**



**Ground rules:**

- Sharp 9:30AM start every day.
- Tea breaks (15 minutes) in both the morning and afternoon sessions.
- While Saturdays and Sundays have generally been kept free, Saturdays will be reserve days and some Saturdays will be utilized for sessions, activities, etc.
- Participants will be divided into “learning teams”, with each learning team consisting of 4 participants – these learning teams will remain for the duration of the boot camp.

**Day 1: 21<sup>st</sup> May 2018**

	<b>Topic</b>	<b>Speaker</b>
9:30AM to 10:30AM	Introduction to the program <ul style="list-style-type: none"> <li>- Why are you here</li> </ul>	Sunita Naik, Jayashree Sathy, Sachin Maheshwari (State Street); Amit Chakarabarty, CFA Institute
10:30AM to 11:30AM	Let’s get started <ul style="list-style-type: none"> <li>- Rules of the program, college, hostel, etc.</li> <li>- Formation of “learning teams” (4 per team, 10 learning teams)</li> <li>- Structure of the four weeks</li> <li>- Participants’ expectations from the program</li> </ul>	Macy Yan, CFA Institute; Florence Wong, CFA Institute; Amit Chakarabarty, CFA Institute
11:30AM to 1:30PM	Team building exercise <ul style="list-style-type: none"> <li>- Getting to know each other</li> </ul>	Macy Yan, CFA Institute; Florence Wong, CFA Institute; Amit Chakarabarty, CFA Institute
1:30PM to 2:30PM	LUNCH	
2:30PM to 6:00PM	<b>Investment industry overview</b> <u>Learning outcome statements:</u> <ol style="list-style-type: none"> <li>a. Describe the financial services industry;</li> <li>b. Identify types of financial institutions, including banks and insurance companies;</li> <li>c. Define the investment industry;</li> <li>d. Explain how economies benefit from the existence of the investment industry;</li> <li>e. Explain how investors benefit from the existence of the investment industry;</li> <li>f. Describe types and functions of participants of the investment industry;</li> <li>g. Describe forces that affect the evolution of the investment industry.</li> </ol>	Ravi Raman, State Street
6:00PM to 6:15PM	Summarize the day – “learning team” led <ul style="list-style-type: none"> <li>- Send summary of learning to CFA Institute</li> </ul>	Learning team 1



Day 2: 22<sup>nd</sup> May 2018

	Topic	Speaker
9:30AM to 1:30PM	Writing best practices – workshop	Shreenivas Kunte, CFA Institute
1:30PM to 2:30PM	LUNCH	
2:30PM to 5:30PM	Writing best practices – workshop - Group exercises	Shreenivas Kunte, CFA Institute
5:30PM to 5:45PM	Summarize the day – “learning team” led Send summary of learning to CFA Institute	Learning team 2

Day 3: 23<sup>rd</sup> May 2018

	Topic	Speaker
9:30AM to 1:30PM	<b>Ethics, and how it relates to professionalism</b> <u>Learning outcome statements:</u> a. Describe the need for ethics in the investment industry; b. Identify obligations that individuals in the investment industry have to clients, prospective clients, employers, and co-workers; c. Identify elements of the CFA Institute Code of Ethics; d. Explain standards of practice (professional principles) that are based on the CFA Institute Code of Ethics; e. Describe benefits of ethical conduct; f. Describe consequences of conduct that is unethical or unprofessional; g. Describe a framework for making ethical decisions.	Sonia Gandhi, SEV Advisors
1:30PM to 2:30PM	LUNCH	
2:30PM to 5:30PM	<b>Regulations and regulators</b> <u>Learning outcome statements:</u> a. Define regulations; b. Describe objectives of regulation; c. Describe potential consequences of regulatory failure; d. Describe a regulatory process and the importance of each step in the process; e. Identify specific types of regulation and describe the reasons for each; f. Describe elements of a company’s policies and procedures to ensure the company complies with regulation;	Sonia Gandhi, SEV Advisors



	g. Describe potential consequences of compliance failure.	
5:30PM to 5:45PM	Summarize the day – “learning team” led Send summary of learning to CFA Institute	Learning team 3

**Day 4: 24<sup>th</sup> May 2018**

	<b>Topic</b>	<b>Speaker</b>
9:30AM to 1:30PM	<b>Microeconomics</b> <u>Learning outcome statements:</u> a. Define economics; b. Define microeconomics and macroeconomics; c. Describe factors that affect quantity demanded and supplied; d. Describe market equilibrium; e. Distinguish between accounting profit and economic profit; f. Identify factors that affect pricing; g. Compare types of market environment: perfect competition, pure monopoly, monopolistic competition, and oligopoly;	Sonia Gandhi, SEV Advisors
1:30PM to 2:30PM	LUNCH	
2:30PM to 5:30PM	Group presentation by Learning teams 6-10 - What’s been covered Day 1 to 3	Learning teams 6-10
5:30PM to 5:45PM	Summarize the day – “learning team” led Send summary of learning to CFA Institute	Learning team 4

**Day 5: 25<sup>th</sup> May 2018**

	<b>Topic</b>	<b>Speaker</b>
9:30AM to 1:30PM	<b>Macroeconomics</b> <u>Learning outcome statements:</u> a. Describe why macroeconomic considerations are important to an investment firm and how macroeconomic information may be used; b. Define gross domestic product (GDP) and GDP per capita; c. Identify basic components of GDP; d. Describe economic growth and factors that affect it; e. Describe phases of a business cycle and their characteristics; f. Define inflation, deflation, stagflation, and hyperinflation, and describe how inflation affects consumers, businesses, and investments;	Mohan Kumar Prabhu, AON



	g. Describe and compare monetary and fiscal policy;	
1:30PM to 2:30PM	LUNCH	
2:30PM to 5:30PM	<b>Business etiquette</b> - Email, in-person, virtual, listening skills, meetings, appropriate clothing.	Sunita Naik, SSGA
5:30PM to 5:45PM	Summarize the day – “learning team” led Send summary of learning to CFA Institute	Learning team 5

**Day 6: 28<sup>th</sup> May 2018**

	Topic	Speaker
9:30AM to 1:30PM	<b>Financial statements concepts (part 1)</b> <u>Learning outcome statements:</u> a. Describe the roles of standard setters, regulators, and auditors in financial reporting; b. Describe information provided by the balance sheet; c. Compare types of assets, liabilities, and equity; d. Describe information provided by the income statement; e. Distinguish between profit and net cash flow; f. Describe information provided by the cash flow statement;	Vidhi Trehan, Evalueserve
1:30PM to 2:30PM	LUNCH	
2:30PM to 5:30PM	Group presentation by Learning teams 1-5 - What’s been covered Day 4 to 5	Learning teams 1-5
5:30PM to 5:45PM	Summarize the day – “learning team” led Send summary of learning to CFA Institute	Learning team 6

**Day 7: 29<sup>th</sup> May 2018**

	Topic	Speaker
9:30AM to 1:30PM	<b>Financial statements concepts (part 2)</b> <u>Learning outcome statements:</u> g. Identify and compare cash flow classifications of operating, investing, and financing activities; h. Explain links between the income statement, balance sheet, and cash flow statement; i. Explain the usefulness of ratio analysis for financial statements; j. Identify and interpret ratios used to analyze a company’s liquidity, profitability, financing, shareholder return, and shareholder value.	Vidhi Trehan, Evalueserve



1:30PM to 2:30PM	LUNCH	
2:30PM to 5:30PM	Team building exercise	TBD
5:30PM to 5:45PM	Summarize the day – “learning team” led Send summary of learning to CFA Institute	Learning team 7

**Day 8: 30<sup>th</sup> May 2018**

	Topic	Speaker
9:30AM to 1:30PM	<b>Quantitative concepts (part 1)</b> <u>Learning outcome statements:</u> <ol style="list-style-type: none"> <li>a. Define the concept of interest;</li> <li>b. Compare simple and compound interest;</li> <li>c. Define present value, future value, and discount rate;</li> <li>d. Describe how time and discount rate affect present and future values;</li> <li>e. Explain the relevance of net present value in valuing financial investments;</li> <li>f. Describe applications of time value of money;</li> <li>g. Explain uses of mean, median, and mode, which are measures of frequency or central tendency;</li> <li>h. Explain uses of range, percentile, standard deviation, and variance, which are measures of dispersion;</li> <li>i. Describe and interpret the characteristics of a normal distribution;</li> <li>j. Describe and interpret correlation.</li> </ol>	Prof. Sridevi, IFIM
1:30PM to 2:30PM	LUNCH	
2:30PM to 5:30PM	Group presentation by Learning teams 6-10 - What’s been covered Day 6 to 7	Learning teams 6-10
5:30PM to 5:45PM	Summarize the day – “learning team” led Send summary of learning to CFA Institute	Learning team 8

**Day 9: 31<sup>st</sup> May 2018**

	Topic	Speaker
9:30AM to 1:30PM	<b>Quantitative concepts (part 2)</b> <u>Learning outcome statements:</u> <ol style="list-style-type: none"> <li>k. Define the concept of interest;</li> <li>l. Compare simple and compound interest;</li> <li>m. Define present value, future value, and discount rate;</li> <li>n. Describe how time and discount rate affect present and future values;</li> <li>o. Explain the relevance of net present value in valuing financial investments;</li> </ol>	Prof. Sridevi, IFIM



	<ul style="list-style-type: none"> <li>p. Describe applications of time value of money;</li> <li>q. Explain uses of mean, median, and mode, which are measures of frequency or central tendency;</li> <li>r. Explain uses of range, percentile, standard deviation, and variance, which are measures of dispersion;</li> <li>s. Describe and interpret the characteristics of a normal distribution;</li> <li>t. Describe and interpret correlation.</li> </ul>	
1:30PM to 2:30PM	LUNCH	
2:30PM to 5:30PM	<b>Art of Networking</b> <ul style="list-style-type: none"> <li>- Best practices</li> <li>- Simulation</li> </ul>	Richard McGillivray, CFA Institute
5:30PM to 5:45PM	Summarize the day – “learning team” led Send summary of learning to CFA Institute	Learning team 9

**Day 10: 1<sup>st</sup> June 2018**

	Topic	Speaker
9:30AM to 1:30PM	<b>Speaking/presentation best practices</b>	Richard McGillivray, CFA Institute
1:30PM to 2:30PM	LUNCH	
2:30PM to 6:00PM	<b>Speaking/presentation</b> <ul style="list-style-type: none"> <li>- Group exercises</li> </ul>	Richard McGillivray, CFA Institute
6:00PM to 8:00PM	Practice networking in an informal get-together	ALL

**Day 10 (Continued): 2<sup>nd</sup> June 2018**

	Topic	Speaker
9:30AM to 4:00PM	<b>Speaking/presentation best practices</b> <ul style="list-style-type: none"> <li>- Recap</li> <li>- Group exercises</li> </ul>	Richard McGillivray, CFA Institute

**Day 11: 4<sup>th</sup> June 2018**

	Topic	Speaker
10:0AM to 11:30PM	How will the day look like <ul style="list-style-type: none"> <li>- What to expect</li> </ul>	Amit Chakarabarty, CFA Institute
11:45AM	Travel to State Street offices by bus	
1:00PM to 2:00PM	LUNCH	
2:00PM to 5:00PM	<b>Site visit</b> <ul style="list-style-type: none"> <li>- State Street</li> </ul>	Amit Chakarabarty, CFA Institute
5:00PM	Leave for university campus/hostel	



Day 12: 5<sup>th</sup> June 2018

	Topic	Speaker
9:30AM to 1:30PM	<b>Securities (part 1)</b> <u>Learning outcome statements:</u> a. Issuers, features and types of debt securities; b. Define current yield and yield curve; c. Explain the relationship between a bond's price and its yield to maturity; d. Explain risks of investing in debt securities; e. Describe the discounted cash flow approach to valuing debt securities; f. Features and types of equity securities; g. Compare risk and return of equity and debt securities;	Vivek Pai, Aroha Capital
1:30PM to 2:30PM	LUNCH	
2:30PM to 3:30PM	<b>Innovation and Entrepreneurship</b>	Sanjay Padode, IFIM
3:30PM to 5:00PM	Group presentation by Learning teams 1-5 - What's been covered Day 8 to 11	Learning teams 1-5
5:00PM to 5:30PM	Announcement of internships	Amit Chakarabarty, CFA Institute
5:30PM to 5:45PM	Summarize the day – "learning team" led Send summary of learning to CFA Institute	Learning team 10

Day 13: 6<sup>th</sup> June 2018

	Topic	Speaker
9:30AM to 1:30PM	<b>Securities (part 2)</b> <u>Learning outcome statements:</u> h. Describe approaches to valuing common shares; i. Describe company actions that affect the company's shares outstanding; j. Define a derivative contract and describe uses of derivative contracts; k. Describe key terms of derivative contracts; l. Describe forwards and futures, and distinguish between them; m. Describe options and their uses; n. Define swaps and their uses.	Sachin Maheshwari, State Street
1:30PM to 2:30PM	LUNCH	
2:30PM to 5:30PM	Preparation time: - Final presentation - Resume	Sachin Naik, CFA Institute
5:30PM to 5:45PM	Summarize the day – "learning team" led Send summary of learning to CFA Institute	Learning team 1





**Day 14: 7<sup>th</sup> June 2018**

	<b>Topic</b>	<b>Speaker</b>
9:30AM to 1:30PM	<b>Alternative investments</b> <u>Learning outcome statements:</u> <ol style="list-style-type: none"> <li>Describe advantages and limitations of alternative investments;</li> <li>Describe private equity investments;</li> <li>Describe real estate investments;</li> <li>Describe commodity investments.</li> </ol>	Jayashree Sathy, State Street
1:30PM to 2:30PM	LUNCH	
2:30PM to 4:00PM	<b>Sustainable Investing</b>	Ravi Gautham, Northern Trust
4:00PM to 5:30PM	Group presentation by Learning teams 6-10 - What's been covered Day 12 to 13	Learning teams 6-10
5:30PM to 5:45PM	Summarize the day – “learning team” led Send summary of learning to CFA Institute	Learning team 2

**Day 15: 8<sup>th</sup> June 2018**

	<b>Topic</b>	<b>Speaker</b>
9:30AM to 1:30PM	<b>Investment industry participants and structures (part 1)</b> <u>Learning outcome statements:</u> <ol style="list-style-type: none"> <li>Describe needs served by the investment industry;</li> <li>Describe financial planning services, investment management services, investment information services, trading services;</li> <li>Compare the roles of brokers and dealers;</li> <li>Distinguish between buy-side and sell-side firms in the investment industry;</li> <li>Distinguish between front-, middle-, and back-office functions in the investment industry;</li> <li>Identify positions and responsibilities within firms in the investment industry.</li> </ol>	Hansi Mehrotra, Money Hans
1:30PM to 2:30PM	LUNCH	
2:30PM to 5:30PM	<b>Building careers</b> <ul style="list-style-type: none"> <li>- Finding a purpose</li> <li>- Choosing the right career</li> </ul>	Hansi Mehrotra, Money Hans



5:30PM to 5:45PM	Summarize the day – “learning team” led Send summary of learning to CFA Institute	Learning team 3
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Day 16: 11<sup>th</sup> June 2018

	Topic	Speaker
9:30AM to 1:30PM	<b>Investment industry participants and structures (part 2)</b> <u>Learning outcome statements:</u> g. Compare direct and indirect investing in securities and assets; h. Distinguish between pooled investments, including open-end mutual funds, closed-end funds, and exchange-traded funds; i. Describe security market indices including their construction and valuation, and identify types of indices; j. Describe index funds, including their purposes and construction; k. Describe hedge funds, funds of funds and managed accounts;	Hansi Mehrotra, Money Hans
1:30PM to 2:30PM	LUNCH	
2:30PM to 5:30PM	<b>FinTech</b> a. Essentials of fintech b. Coming together of large financial institutions, technology companies and start-ups.	Pravin Goel, BlackRock
5:30PM to 5:45PM	Summarize the day – “learning team” led Send summary of learning to CFA Institute	Learning team 4

Day 17: 12<sup>th</sup> June 2018

	Topic	Speaker
9:30AM to 1:30PM	<b>Efficient financial markets</b> <u>Learning outcome statements:</u> a. Distinguish between primary and secondary markets; b. Explain the role of investment banks in helping issuers raise capital; c. Describe primary market transactions, including public offerings, private placements, and right issues;	Pravin Goel, BlackRock



	<ul style="list-style-type: none"> <li>d. Explain the roles of trading venues, including exchanges and alternative trading venues;</li> <li>e. Identify characteristics of quote-driven, order-driven, and brokered markets;</li> <li>f. Describe market efficiency in terms of operations, information, and allocation.</li> </ul>	
1:30PM to 2:30PM	LUNCH	
2:30PM to 3:00PM	Entrepreneurship	Dr. Srividya, IFIM
3:30PM to 5:30PM	Personal finance	Ratnasiri Karra, Her-mony
5:30PM to 5:45PM	Summarize the day – “learning team” led Send summary of learning to CFA Institute	Learning team 5

**Day 18: 13<sup>th</sup> June 2018**

	Topic	Speaker
9:30AM to 1:30PM	<p><b>Risk management and mitigation</b></p> <p><u>Learning outcome statements:</u></p> <ul style="list-style-type: none"> <li>a. Define risk and identify types of risk;</li> <li>b. Define risk management;</li> <li>c. Describe a risk management process;</li> <li>d. Describe risk management functions;</li> <li>e. Describe benefits and costs of risk management;</li> <li>f. Define operational risk and explain how it is managed;</li> <li>g. Define compliance risk and explain how it is managed;</li> <li>h. Define investment risk and explain how it is managed;</li> <li>i. Define value at risk and describe its advantages and weaknesses.</li> </ul> <p>-</p>	Aditi Gupta, State Street
1:30PM to 2:30PM	LUNCH	
2:30PM to 5:30PM	<p><b>Video interviews</b></p> <ul style="list-style-type: none"> <li>- Participants</li> <li>- Partners</li> </ul>	Amit Chakarabarty, CFA Institute
5:30PM to 5:45PM	Summarize the day – “learning team” led Send summary of learning to CFA Institute	Learning team 6

**Day 19: 14<sup>th</sup> June 2018**

	Topic	Speaker
9:30AM to 11:30AM	Dealing with ambiguity in a business environment – an ethics workshop	Amit Chakarabarty, CFA Institute



11:30AM to 1:30PM	Building an international career	Karyn McLean, CFA Institute
1:30PM to 2:30PM	LUNCH	
2:30PM to 4:00PM	Mentors: How to identify a mentor, and the importance of having mentors	Arati Porwal, CFA Institute
4:00PM to 5:30PM	Group presentation by Learning teams 6-10 - What's been covered Day 17 to 18	Learning teams 6-10
5:30PM to 5:45PM	Summarize the day – “learning team” led Send summary of learning to CFA Institute	Learning team 7

**Day 20: 15<sup>th</sup> June 2018**

	Topic	Speaker
9:30AM to 1:30PM	Final presentations* (batch 1)	Participants
1:30PM to 2:30PM	LUNCH	
2:30PM to 5:00PM	Final presentations* (batch 2)	Participants
5:00PM to 5:45PM	Wrap-up	Amit Chakarabarty, CFA Institute

**\* Final presentation topics:**

1. Technology and financial services - How companies like Amazon and Google expect to do (very) well.
2. What's happening in the mutual fund industry in India - key developments, growth and the future.
3. The rise of the stock market in India - what's been happening last 5 years, and how does it compare to other emerging markets.
4. India as a hub for global financial services companies - from BPO to value add services to frontline services.
5. India on a sustainable growth path - significance of structural reforms like Jan Dhan Yojana, Aadhar, GST, Bankruptcy code, etc.
6. What is driving sustainable investing growth, and how closely related are ESG factors to company performance and stock price.
7. Infrastructure development in India - what's going right, what's going wrong and why infrastructure development is critical to sustain growth momentum.
8. Cryptocurrency - is this a fad or is it for real.
9. India-China: a geopolitical ticking bomb or an opportunity to rule the world.
10. Emergence of unicorns in India - what led to this, how do these unicorns compare to ones in China and US, and is there a case for significant more unicorns in India.