



Certified Financial Expert

Supported by

Indian Banks Association (IBA)

Association of Mutual Funds of India (AMFI)

General Insurance Council

100% Placement Assistance



Why CFX Certification?

- ✓ **Curriculum is based on 4 Principles of Learning**
 - Doing- Workshops and Simulations*
 - Experiencing - Case studies, role plays*
 - Observing- Master Classes*
 - Implementing- Group Discussion & Presentation*
- ✓ **Learning and mentorship by senior industry practitioners**
- ✓ **Receive training in Regulatory NISM Certification**
- ✓ **Practical relevance of financial concepts in real life job roles**

CFX is a short certification program to kick start your career in Banking, Financial Services and Insurance (BFSI) sector

Program Content

Technical Skills

- Introduction to Securities Markets
- Securities: Types, Features And Concepts
- Primary Markets
- Secondary Markets
- Derivative Markets
- Mutual Fund
- Banking
- Lending
- Insurance Concepts
- Life Insurance
- Health Insurance
- General Insurance
- Financial Planning
- NISM VA Certification

Behavioural Skills

- Growth Mindset
- Grit, Purpose and Resilience
- Communication
- Grooming
- Time Management
- Excellence and Process Orientation
- Work Ethics

Business & Selling skills

- What is Selling?
- Customer Needs
- Sales Process
- Steps of Sales -II
- Territory Coverage
- Relationship Management
- Sales Data Analytics
- Virtual sales

Masterclass covering a wide range of topics. Learn valuable tips, strategies, and insights from our experts.

Topics include:

- Fixed income
- Equity Research
- Financial Planning
- How to ace an interview?
- Build your personal brand - Why LinkedIn & not Instagram is your friend
- How to transition from 'College Life' to 'Work life'

Training and operational support for NISM-VA certification along with four practice tests.

Student Success Stories



"I recently completed NISM VA coaching with Finx, and their placement process was seamless and efficient. The team provided regular updates, transparent communication, and great support throughout. Thanks to their guidance, I secured a job with Aspire Banking at RBL Bank. I highly recommend Finx for a smooth placement experience!

Shruti Satyanaryana | RM - Aspire banking | CTC : 5 LPA



My journey with FinX has been truly enriching. The experience of working and learning new things has been both enjoyable and insightful. The support I received from FinX played a crucial role in helping me secure a placement, and I am incredibly grateful for their guidance. It has been a wonderful experience, and I highly recommend FinX to anyone looking for professional growth and opportunities.

Aarti Nagra | RM - Aspire banking | CTC : 2.75 LPA



My experience has been great, with excellent training from the start. Being part of a growing startup has given me the opportunity to learn new things and explore exciting opportunities!

Priyanshu Gupta | RM Niyo Global | CTC : 4.75 LPA



"My experience at HDFC Bank has been incredible so far. In just three months, I have gained valuable exposure, managing corporate clients and distributors with confidence. The training I received in my first month was exceptional, equipping me with the skills needed to excel in my role. I am truly grateful to FinX for providing me with this opportunity and for their unwavering support in shaping my career.

Tushar Kumar | HDFC AMC | CTC : 5.5 LPA

Placement Partners

Work with the most reputed names in the Banking, Financial Services and Insurance industry



Academic Mentors

Dr Uma Shashikant



- Doctorate in Finance
- Founder and Chairperson, CIEL
- Former Professor at the National Institute of Securities Markets (NISM)

Dr Uma has been a personal finance columnist since 2003 and currently writes a weekly column for ET Wealth.

Dr Raj Agnihotri



- PhD from Kent State University
- Mary Warner Fellow and founding Director of Ivy Sales Forum
- Former John Merrill Endowed Professorship in Consultative Sales at University of Texas-Arlington

Dr Raj currently serves on the advisory boards of startups based in US, Europe, and India.

Nikunj Sharma



- MBA in Finance
- Director, CIEL
- Head Investor Awareness & Training

Nikunj has over 25 years of experience in the BFSI industry and a published author of the book 'The Stock Market Monk'

Harish Menon



- Chartered Accountant
- Founder & CEO of H-Zone Capital Management Services (H-Zone Capital) & Co-Founder of House of Alpha

Harish has over 20 years of experience in financial markets, taxation & accountancy.

Joydeep Sen



- MBA, CFP Finance
- Corporate Trainer, Author, Columnist
- Former Senior Vice President - Advisory Desk at BNP Paribas Wealth Management

Joydeep has over 25 years of experience and has been awarded "100 Most Influential BFSI Leaders" by BFSI Congress.

Rajendra Kalur



- MBA in Finance & CFA
- Life Goals Practitioner
- Volunteer Director CFA Society, India

Rajendra has over 20 years of experience and has worked in senior management positions in organisations like DSP Merrill Lynch, ABN Amro & ICICI Pru AMC

Suraj Kaeley



- MMS in Marketing
- Master Coach - Retirement Income Course & The Sales Accelerator
- Former Group President for Sales & Marketing at UTI.

Suraj has over 30 years of industry experience and worked at senior leadership positions at Franklin Templeton, MetLife Insurance, FIL Fund Management.

T.S.Jagadharini



- Associate Member of Institute of Company Secretaries of India
- Former Executive Director at JP Morgan Chase
- Empanelled with NISM to conduct certification programs

Jagadharini comes with over 20 years of experience and has also served as Vice President, NSE.

About Us

We are a skilling company, driven by the promise of a brighter India, vision of connecting formal education with practical skilling to create job ready students for BFSI. We are one the largest corporate training companies in BFSI Industry and have been providing corporate learning solutions since 18+ years to employees and professionals in Banking, Asset Management, Wealth Advisory, Insurance, Financial Distribution and Broking Companies.

We are headquartered in Mumbai (financial capital of India) with presence in over 100 cities across the country**. Senior Management team comprises accomplished & seasoned professionals from BFSI Industry with cumulative experience of over 400 years.

We work with Universities, Colleges, BFSI Corporates & Learners with an objective to:

- Skill students to be Job ready & offer them 100% placement assistance
- Train corporate employees on regulatory gate-keeping examinations, specialised certifications in finance & online courses.
- Conduct customised induction programs and productivity enhancing techno - behavioural trainings
- Conduct Financial Awareness Programs on behalf of Regulators, Stock Exchanges and Mutual Funds for corporate employees, faculty, students, self-employed, women groups etc.

