Integrating AI and Data Science based system in Mutual Fund

An Intensive Full day Workshop

Why Step up & Stand Out?

In today's hyper-competitive financial landscape, relying on generic tools and advice is no longer enough. Investors demand more, and so should you. The most successful wealth managers know there's always room to refine and grow – than, Why Wait ?

What This is **NOT**:

- **NOT** a lecture on market basics, outlook or mutual funds 101.
- **NOT** a motivational talk or a sales playbook.
- This is actionable, **next-level mastery designed to deliver tangible results**.

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What's Inside This Workshop

VALUATION MATHS & EARNINGS CYCLE ASSESSMENT — 01

🕐 (2 Hours)
- 10+ time-tested metrics
- Interpretation backed by data science

DATA SCIENCE IN MF CATEGORY ASSESSMENT — 02

🕐 (1 Hour)
- Category analytics for evaluating margin of safety

STYLE SELECTION & ROTATION — 03

🕐 (30 mins)
- Cycle & Zone Study for selecting and rotating investment styles

USING MULYANKAN GPT & MOBILE OPTIMIZED APPLICATION — 04

🕐 (1 Hour)
- Build robust portfolios based on category analytics and investor profiles

ALLOCATION GUIDELINE BY AMC CEO / CIO & VALUATION CHECKLIST BY MODELLING SPECIALIST — 05

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WHY ONE CAN'T AFFORD TO MISS THIS

Straightforward **Know-How On:**

- **Optimizing Portfolio Performance**
- **Managing Portfolio Risk** like a pro and avoid costly mistakes
- **Leveraging AI in the Mutual Fund Space** to save time

WHAT YOU'LL GAIN

- Higher Wallet Share and Confidence to manage large sum of money through Structured Framework and System

- Growth in Trail Commissions through superior advisory outcomes.

SAY **GOODBYE** TO

- Guesswork.
- Time-consuming processes.
- Narrative-based decisions.

SAY **HELLO** TO

A Structured and Evidence based investing Framework that combines:
- Risk profiling of asset classes and categories.
- Investor Profile

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ACCREDITED PORTFOLIO VALUATOR & REVIEWER™

Eligibility Criteria

☑ **Premium Mulyankan User:** Only users with a premium subscription to Mulyankan are eligible to enroll

☑ **Attendance Requirement:** Mandatory full-day program attendance

☑ ·**Apply Practical knowledge to real-world scenarios using Mulyankan tools :**
- Analyze and interpret valuation trends using Mulyankan's excel templates.
- Leverage Mulyankan's GPT for intelligent portfolio queries and decision-making.
- Navigate and utilize the mobile optimized dashboard

☑ **Should Pass Online Exam**

Certification Showcase

⊘ Digital certificates with secure validation links

⊘ Validity : 6 Year

⊘ Includes a unique certificate ID

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