EVALUESERVE
PEOPLE DEVELOPMENT PROGRAMS

EVALUESERVE
POWERED BY MIND+MACHINE

# Financial Services

Employees joining the Evalueserve Financial Services business unit undergo in-house domain specific certification programs focusing on our key service areas, namely, markets research, investment banking support, investment management, index research & quantitative finance and risk & compliance.

# Programs




## Learn. Apply. Grow.

Evalueserve is constantly looking for people with varied experience and interests. We support employee growth through ongoing learning, professional development, and career growth programs.

Evalueserve's learning platforms offer an extensive menu of training programs focused on key business and technical skills required to speed up professional growth. These programs are made available to each analyst across the organization, which also promotes and enables mobility across divisions.

In order to encourage our employees to constantly upskill themselves, we reimburse examination and membership fees for the CFA and FRM certifications.

# Market Research

Evalueserve offers two key certification programs for employees working on fundamental research profiles, namely, the Certified Equity Research Analyst (CERA) program and the Certified Credit Research Analyst (CCRA) program.

## Certified Equity Research Analyst (CERA):

Evalueserve's Certified Equity Research Analyst (CERA) program is a three-level program (induction, intermediate and advanced) designed to equip employees joining the equity research function with skills that are vital for a successful career in equity analysis. It is delivered through a combination of instructor-led and mentorship sessions and focuses how to analyze and model company performance, determine company valuation, the use of statistical analysis tools, how to capture and summarize company and sector new flows, investment note writing, analyzing company corporate actions and sector specific knowledge development.

### Level:

Induction, intermediate, advanced

### Length:

30-120 hours

### Teaching methods:

- Instructor-led sessions
- Mentorship sessions

## Certified Credit Research Analyst (CCRA):

The Certified Credit Research Analyst (CCRA) is a two – level program (induction and advanced). The program provides employees exposure to company credit analysis through a combination of instructor-led learnings and assignments. It covers critical aspects of credit research, including company financial performance analysis, debt instruments, corporate credit analysis – the 5 "Cs" of credit, credit modelling, recovery analysis, shadow ratings, debt comparable analysis, credit notes, and tear sheets.

# Investment Banking

Evalueserve offers two key certification programs for employees working on investment banking research profiles, Evalueserve's Certified Investment Banking Analyst program and the Certified Investment Research Analyst program.

## Certified Investment Banking Analyst (CIBA):

The Certified Investment Banking Analyst (CIBA) program is a three-level program (induction, intermediate, advanced) designed to equip employees with an in-depth understanding of investment banking tasks performed by the "Street". It is offered through a combination of instructor-led training, in-class simulations, and mentorship, and focuses on basics of company financial performance analysis, company profiling, comparable company and debt analysis, company valuation, merger and LBO analysis, how investment bankers screen for targets and acquirers, pitch books, and sector-specific knowledge development.

### Level:

Induction, intermediate, advanced

### Length:

40-200 hours

### Teaching methods:

- Instructor-led sessions
- In-class simulations
- Mentorship sessions

## Certified Investment Research Analyst (CIRA):

The Certified Investment Research Analyst (CIRA) program is a three-level program (instructor led training + OJT + mentorship program) targeted at providing hands-on exposure to the library services function offered by investment banks and other financial institutions. It is designed to equip employees to perform business research in the most efficient and timely manner. The instructor-led training expose employees to conceptual learnings on capital markets, EIC analysis, equity and debt valuation terminologies, volume runs and league tables, and effective communication techniques. The OJT focuses on enhancing employee knowledge of generic and sector-specific databases. The mentorship program is designed to equip employees with in-depth sector knowledge.

# Investment Management

Employees working on investment management roles including asset management, ESG and business research have the opportunity to attend focused boot camps including the ESG Research boot camp and CaLiBRe – Evalueserve's market intelligence certification program.

## Environment, Social and Governance (ESG) Research:

The ESG bootcamp is a learning platform aimed to help new hires obtain an understanding of the fundamentals of environmental, social, and governance (ESG) factors in sustainable investing and how they can fetch long-term benefits to industries, companies, and investors.

The program broadly covers company business segments analysis; screening company presence in exclusion activities; understanding a company's ESG practices in high-risk countries, evaluating a company's environmental and social impact, as well as analyzing a company's governance structure and performance.

### Level:

Multi

### Length:

40-50 hours

### Teaching methods:

- Instructor-led sessions
- In-class simulations

## Business Research:

Evalueserve's Market Intelligence program Certified Analyst in Business Research (CaLiBRe) focuses on primary and secondary research skills, macroeconomics, financial analysis, company profiles, industry research, and competitive benchmarking. The program is relevant for new hires joining in market research roles.

# Data Analytics

Evalueserve's Data Scientist Program (DSP) is relevant to employees working in analytics related roles within markets research and investment management. The 3 – month bootcamp focuses on developing key skills relating to ETL, data analysis, statistics, visualization and structured story telling.

## Module I - Data Management:

Candidates learn how to clean and integrate data, source/mine internal and external data, and basics of data mart management (Extract – Transform – Load).

**Tools:** SQL, Excel, VBA, Python, Business English

## Module II – Analytics & Statistics:

Candidates will learn simple statistics and analytics techniques to make sense of the data and derive meaningful insights that can support objective decision making.

**Tools:** Statistics, SAS, R, Structured Thinking & Writing

## Module III – Data Visualisation:

Candidates will learn how different business intelligence (BI) tools allow them to visualize data and communicate information clearly and effectively through graphical means.

**Tools:** Tableau, Excel, Power BI

### Level:
Entry

### Enrolment:
Optional

### Length:
3 months

### Teaching methods:
- Instructor-led sessions
- In-class simulations

# Risk & Compliance

Employees joining the risk division are required to go through the Market & Credit Risk bootcamp. This program provides base knowledge for roles relating to model risk management for front office risk, market, credit and enterprise risk management and reporting.

## Market & Credit Risk bootcamp:

This program focuses on developing an understanding of the pricing and risk related to equities, fixed income and derivatives, how to measure and monitor market risk using VaR methodologies, developing an understanding of credit risk including bank regulations, ALM, credit cycle and credit risk monitoring models and model risk – monitoring, validation and reporting lifecycle.

**Tools:** R & Python implementation of basic portfolio management and market risk concepts, VAR calculations and credit risk modelling

Level:
Induction

Enrolment:
Mandatory

Length:
100 hours

Teaching methods:
- Instructor-led sessions
- In-class simulations

# Index Research

Employees working on index research and reporting related profiles have the opportunity to attend Evalueserve's Quantitative Finance Program (QFP) – a two level program focused on the financial and technical skills that are essential for a successful role in index research.

## Quantitative Finance Program (QFP):

This program includes practical approaches to developing basic knowledge on how indices function. It exposes employees to the application of Excel, VBA and SQL in investment analysis; time value of money and portfolio management concepts; index calculations relating to fundamental investments (including equities, fixed income, derivatives), and alternative investments (commodities and ETFs). It includes practical applications relating to index maintenance, development, strategy back testing & rebalancing.

**Tools:** MS Excel, VBA, Python, Access, SQL

Level:
Basic & Advanced

Length:
80-120 hours

Teaching methods:
- Instructor-led sessions
- In-class simulations

"Evalueserve helped me identify my core strengths and showed me a distinct career path. My move to Raleigh from the Mumbai center as a group manager has helped me nurture my people skills and multi-tasking abilities. It has also provided me with wide exposure to different challenges related to the industry. The Raleigh center is a hub of talent that has helped me develop my thought leadership."

*Latika Kapoor, Group Manager*

For further information about Evalueserve and its courses:
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