

SVKM's NMIMS
NMIMS – GLOBAL ACCESS SCHOOL FOR CONTINUING EDUCATION

Programme : DBFM/PGDBFM

Academic year: 2014 – 2015
Subject: Marketing of Financial Services

Semester: II
Course : New
Marks : 70
Time: 11.00 a.m. to 2.00 p.m.

Date: 23.06.2014

Instructions:

1. Answer to each new question to be started on a fresh page.
2. Figures in bracket indicate full marks.

Q.1) Attempt any 2 out of 4 **(Marks: 2X5=10)**

- a) RBI guidelines for opening of Deposit accounts
- b) Active v/s Passive portfolio management
- c) Cross selling of investment products as a sales strategy
- d) Financing through Self Help Groups (SHGs)

Q.2) Write Short Notes on any 2 out of 5 **(Marks: 2X5=10)**

- a) Financial Planning
- b) Internet banking and use of internet in promoting financial services
- c) Differentiate between transaction marketing and Customer relationship marketing
- d) Syndication of credit
- e) Strategies adopted by banks for mobilizing deposits

Q.3) Attempt any 3 out of 5 **(Marks: 3X10=30)**

- a) Diversification and asset allocation as tools for building an effective investment portfolio. Elaborate on types of asset allocation.
- b) Define Fund-based lending (advances) by banks and explain in detail Working Capital Finance and Project Finance
- c) Discuss the role and benefits of (a) Institutional channels and; (b) stock exchanges as mutual fund distributors
- d) Marketing of fee-based financial services by banks.
- e) Elaborate on the qualities & skills required to be an effective negotiator in the financial services industry

Q.4) Attempt both the questions **(Marks: 2X10=20)**

- a) Design a marketing mix for a bank and explain the significance of each P with relation to a bank.
- b) Discuss the marketing of insurance products in relation to Indian context. Mention the various distribution channels used by Insurance companies in India.
