**Marketing of Financial Services**

**April 2022 Examination**

**Q1. Develop a Service Marketing Mix (using 8 Ps) for an Asset Management Company (Mutual Fund) of your choice. (10 Marks) )**

**Ans 1.**

**Introduction:**

A marketing mix is a strategy that encompasses all aspects of marketing. It serves as a framework for approaching the marketing plan for your product or service. It also has a strong emphasis on your target market. It enables you to establish a connection with your customers. It also serves as a focal point for activity across your company's numerous departments. You can achieve corporate objectives by combining various factors into a compelling marketing mix. The four Ps of marketing (product, price, location, and promotion) were the foundation of the Its Half solved only

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**Q2. Your client had avoided investing in equities for his long-term goals. He found equity investments too risky and did not understand when to enter and exit the market. Explain some investment techniques that help negate the biases involved in investing. (10 Marks))**

**Ans 2.**

**Introduction:**

Equities investments are sums of money invested in a corporation by purchasing shares of stock on the stock exchange. Typically, these shares are traded on a stock exchange or exchange of stocks. Investing plans have the advantage of being flexible in that they can be changed at any time. You can easily change your mind if you discover that one option does not suit your risk tolerance or timetable. However, keep in mind that doing so may be prohibitively expensive. The cost of every purchase is subject to taxation. Selling assets can also result in a capital gain,

**Q3. You are a Financial Planner. Your client Amit Advani aged 37 years and works with a Pharma company earning Rs 18 lakhs per year. His wife Deepti, aged 34 years, is a homemaker. They have one son Nilesh aged 7 years. The couple requires your help to make some financial decisions. (You can make any assumptions to build up your case further.)**

**a. Amit wants to buy a Pure Risk Life Insurance cover of Rs 2 crore. He is confused about whether he should buy a ULIP, Endowment, or a Term Plan. Recommend the product best suited for his requirement. (5 Marks) )**

**Ans 3a.**

**Introduction:**

When purchasing life insurance, most people don't think about anything besides the sum assured, the premium, and the policy's length. The majority of them obtain life insurance coverage due to recommendations from family, friends, and coworkers, among other sources. There is a

**b. Amit and Deepti want your help to invest for Nilesh’s higher education which they estimate would be required after 14 years. (5 Marks) )**

**Ans 3b.**

**Introduction:**

It is now more important than ever to start saving as soon as possible to reduce your financial burden during your college years. With the rising cost of education, it is critical to start saving as soon as possible. In ten years, funding your child's higher education will undoubtedly be a significant financial burden on your family. Therefore, it is preferable to start investing now