

H. L. College of Commerce (Autonomous)

Self-Financed Programmes

Banking and Financial Services Syllabus

Sem: 3	Course Code: AEC208-2C	Course Title: Sales & Marketing of Financial Products
Credits: 2		Course Category: Ability Enhancement Courses

Course Objective: The objective of this course is to provide students with a fundamental understanding of marketing strategies and practices specific to financial services in India. It aims to equip learners with the ability to analyze the unique characteristics of financial products, understand customer needs, and develop marketing strategies for banking, insurance, mutual funds, and other financial services. The course also explores distribution channels, promotional tools, and the impact of globalization on financial services marketing.

Course Outcomes: Upon successful completion of this course, students will be able to:

CO	Cognitive Abilities	Course Outcomes
CO1	Remembering	Recall the basic concepts of marketing and types of financial markets in India.
CO2	Understanding	Explain marketing strategies used for banking, insurance, and mutual fund products.
CO3	Applying	Apply the marketing mix and strategic tools to attract and retain customers in financial services.
CO4	Analyzing	Analyze various distribution and promotion strategies, including digital and multi-channel delivery methods.
CO5	Evaluating	Evaluate the impact of globalization on financial services and recommend strategic responses.

Course Content

Unit No.	Unit Contents	Sessions Allotted
1	(A) Marketing of Financial Services - A Conceptual Framework; Overview of Financial Markets in India; Concept of Marketing and the 7Ps of Marketing Mix. (B) Marketing of Banking Services - Banking Products and Services; Strategies for Distribution, Pricing, and Promotion; Customer Acquisition and Retention; Credit Cards, Debit Cards, Loans, and Barter Cards.	15
2	(A) Marketing of Investment Services - Marketing of Mutual Funds and Insurance (Life & Non-life), and Pension Funds in India.	15

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Unit No.	Unit Contents	Sessions Allotted
	(B) Distribution & Promotion in Financial Services – Delivery Channels like ATM, EFT, CMS, POS; Bancassurance; Marketing Research, Public Relations, and Globalization in Financial Services.	

Recommended Reading:

1. Marketing of Financial Products and Services, by Prof. (Dr.) R. B. Solanki, Dr. Rajeshwari Malik

Assessment Techniques:

1. Class participation, discussions and attendance
2. MCQs / Quizzes
3. Assignment project for real-world application of the learnings