ज्ञानं जयति सर्वत्र
IIM MUMBAI

EXECUTIVE MBA WEALTH MANAGEMENT

FROM IIM MUMBAI

6TH
RANK IN MANAGEMENT
nirf 2025

Programme Overview

The One-Year Executive MBA - Wealth Management at IIM Mumbai is designed for professionals seeking to enhance their expertise in financial planning, investment strategies and wealth preservation. This comprehensive program blends theoretical insights with practical applications, equipping participants with the knowledge and skills required to navigate the evolving financial landscape.

This One-year weekend-based, on-campus, non-residential program is tailored for working professionals with prior experience in the financial sector or related domains. The Saturday and Sunday class schedule ensures that participants can advance their careers without disrupting their professional commitments. The curriculum is structured to cover core areas such as portfolio management, risk assessment, taxation, estate planning, behavioural finance and emerging investment trends. Through case studies, interactive sessions and expert-led seminars, participants will gain real-world insights into wealth creation and management.

With India's financial sector expanding rapidly and wealth management becoming a crucial aspect of economic growth, professionals with specialised knowledge in this domain are in high demand. Mumbai, India's financial hub, houses leading banks, investment firms and asset management companies, making it the ideal location for professionals to gain cutting-edge expertise. IIM Mumbai's rigorous and research-driven approach ensures that participants are equipped with the latest financial tools and strategies, enabling them to optimise wealth management solutions and drive financial success.

Programme Outcomes

- Executive MBA in Wealth Management with IIM Mumbai alumni status
- Industry-focused curriculum in wealth and investment management
- Strong industry exposure and professional networking in Mumbai
- Weekend learning designed for working professionals
- Real-world insights through cases and expert sessions
- Hands-on learning via live projects and simulations

Programme Objectives

- Build advanced expertise in wealth management, investments, risk assessment, and estate planning
- Instil ethical, client-centric advisory practices to foster trust and long-term client relationships
- Develop capabilities in financial market analysis and investment portfolio optimisation using data-driven insights
- Enable practical application through real-world case studies, expert interactions, and industry exposure
- Gain contemporary perspectives on financial planning, taxation, and behavioural finance to support career progression
- Build leadership capability to manage high-net-worth portfolios and drive sustainable financial growth

Message from the Programme Chairperson

Dr. Ranjani K.S.
Program Chairperson, Executive MBA Wealth Management Faculty Member, IIM Mumbai

At Indian Institute of Management Mumbai, we recognise that wealth management education must evolve in response to the increasing complexity of financial markets, regulatory environments, and investor expectations. For over six decades, the Institute has upheld a strong commitment to academic rigour, research excellence, and leadership development, contributing meaningfully to industry and nation-building.

The MBA – Wealth Management programme is designed for working professionals seeking advanced capability in financial planning, investment and portfolio management, and wealth preservation, grounded in a strategic and ethical perspective. Through a curriculum anchored in industry engagement, research-driven teaching, and case-based learning, the programme enables informed decision-making and responsible leadership. Guided by our enduring motto, **"ज्ञानम् जयति सर्वत्र" — Knowledge Triumphs Everywhere**, IIM Mumbai remains committed to shaping wealth management professionals who create enduring value for clients, institutions and society.

About IIM Mumbai

Indian Institute of Management Mumbai is a premier management institution with a legacy of over 60 years, formerly known as NITIE, and located in Mumbai, India's financial capital. The Institute is widely recognised for its academic rigour, industry integration, and strong foundation in operations, supply chain, analytics, and industrial management.

IIM Mumbai was ranked **6th in the NIRF 2025 Management Rankings,** reflecting its position among India's leading management institutions and its role in developing future-ready business leaders through practice-oriented and research-driven education.

Key Highlights

- Designed for working professionals aspiring to grow in wealth management and financial advisory roles
- Mumbai advantage: Access to India's financial ecosystem, including banks, investment firms and asset managers
- Prestigious IIM Mumbai alumni status with lifelong networking benefits
- One-year immersive programme to accelerate expertise and career progression in wealth management

Course Details

Duration	Course Mode	Schedule
One Year	On Campus	Weekend (Sat & Sun)

Program Structure

Core Courses: 20 courses

- Portfolio & asset allocation
- Investment strategies & derivatives
- Risk management & taxation
- Estate planning & behavioural finance
- Digital transformation and AI/ML in wealth management

Electives: 4 courses

- Offered across finance and related functional areas
- Enables participants to tailor learning to specific wealth management interests

Capstone Project: 2 courses

- Two-stage Capstone Project forming a core academic component
- Enhances practical exposure, industry understanding, and career

Course Curriculum

Module I

Core Courses

• Business Statistics, Linear Optimization	3 credits
• Behavioral Finance for Wealth Management	3 credits
• Wealth Products	1.5 credits
• Leverage and Margin Financing	1.5 credits
• Client Prospecting, Negotiation and Influencing	1.5 credits

Elective

• Elective 1	3 credits

Workshop

• Etiquette Workshop	1.5 credits

Module II

Core Courses

• Introduction to Financial Markets (Banks/NBFCs/Equity/Debt)	3 credits
• Asset Allocation Methodologies	1.5 credits
• Macro Economics	1.5 credits
• Estate Planning	3 credits
• Legal and Ethical Considerations in Wealth Advisory	1.5 credits

Elective

• Elective 2	3 credits

Workshop

• Workshop on Credit Structuring (Cashflows, Collateral, Opco/Holdco, IRR)	1.5 credits

Module III

Core Courses

• Basics of Taxation & Fundamentals of AI/ML	1.5 credits
• Business Accounting	1.5 credits
• Derivative Strategies	3 credits
• Investment Tax Planning	1.5 credits
• Digital Client Engagement	3 credits

Elective

• Marketing Electives	3 credits

Workshop

• Workshop on Tax Computation (Company, Investments, Personal)	1.5 credits

MODULE IV

Core Courses

• Mutual Funds, Distribution Guidelines	1.5 credits
• Corporate Finance	1.5 credits
• Fundamentals of Insurance	1.5 credits
• Financial Planning	1.5 credits
• Digital Transformation in Wealth Management, Future Trends (AI/ML)	1.5 credits

Elective

• Finance Electives	3 credits

Workshop

• Family Office Workshop (Portfolio Analysis and Recommendations)	1.5 credits

Capstone

• Capstone Project 2	10 credits

Learning and Evaluation

- Emphasis on practical application
- Case studies and real-world financial scenarios
- Interactive workshops with experts
- Simulations, role-plays and group discussions

Attendance Policy

- Classes will be conducted in physical mode at the IIM Mumbai campus
- Minimum attendance of 75% is mandatory for all courses
- Leave of absence may be granted up to 25% (4 out of 20 lectures)
- Medical leave may be granted up to 15% (2 out of 20 lectures), subject to valid medical documentation

Attendance Criteria	Policy / Outcome
Attendance ≥75%	No penalty
Attendance ≥65% and <75%	Downgrading by one grade from the actual grade obtained
Attendance ≥50% and <65%	Downgrading by two grades from the actual grade obtained
Attendance <50%	F-Grade and debarred from the examination

Evaluation

Evaluation Component	Weightage Grading
Continuous evaluation (assignment, quiz, case study, class engagement, etc)	40%
Mid -Term Exam	20%
Module ending examination (Final Exam)	40%

Admission Process

Application

- Application fee (₹2,500)
- Contact details
- Documents

Selection

- Book IMAT or Submit a valid IMAT/CAT/GRE/GMAT score
- Personal Interview after shortlisting based on any one of the above tests
- Acceptance Letter for successful candidates

Admission

- Secure your seat
- Classes start on 6th April 2026

Total intake : 100 seats

- Eligible candidates must apply online through the application portal within the admission window
- **A non-refundable application fee of ₹2,500** is payable at the time of registration

Eligibility Criteria

- **Educational Qualification:**
  - First Class Graduates (60% and above) from a recognized university are eligible to apply
  - Engineers from a recognized institution are eligible to apply
  - In case of CGPA/Grades, UGC grade conversion norms will be applied to determine percentage equivalence
  - SC/ST candidates will be eligible for relaxation as per applicable Government of India rules
- **Work Experience:**
  - Minimum two years of relevant post-qualification experience
- **Preferred For:**
  - Candidates with professional experience in banking, finance, wealth management or related domains are encouraged to apply

Important Dates

Event	Dates
Next IMAT Date	8st March 2026
Merit list based on test (IMAT/ GRE/ GMAT/ CAT)	10th March 2026
Personal Interview Dates	16th-18th March 2026
Final Result	25th March 2026
Seat Confirmation Window	13th-23th March 2026
First Instalment	By 6th April 2026 (Commencement of Session)

Fees Structure

Fee Category	Amount
Application fee*	₹2,500
Seat Securing fee	₹1,00,000
First Instalment	₹7,00,000
Second Instalment	₹7,00,000
Total	**₹15,00,000**** inclusive all all taxes

**Non-refundable Application fee ₹2,500 (to be paid during application submission)*

***Application fee not included*

Withdrawal & Refund Policy

If a candidate withdraws their admission at any stage, the refund will be processed in accordance with the applicable guidelines. Withdrawal requests must be submitted in writing or via email to **execed@iimmumbai.ac.in**

Withdrawal Stage	Timing of Withdrawal	Refund Amount
After paying the 1 lakh Seat Securing Fee	Before the commencement of sessions	Paid amount minus ₹1,000
	After the commencement of sessions	No refund
After partial/full payment of remaining academic fees	After the commencement of sessions	No refund (only caution money refunded)

₹50,000 Caution Money is included in the total programme fee. Any eligible refund will be calculated proportionately based on the fee paid.

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