

Trim: Jan – Mar 24		
Maximum Marks: 50	Examination: ETE Exam	Date: 21st April 2024 Duration: 03 hrs
Programme code: 10 Programme: MBA PT MM	Class: SY	Semester/Trimester: VI (SVU 2022-R1)
College: K. J. Somaiya Institute of Management	Name of the department/Section/Center: Marketing	
Course Code:	Name of the Course: Marketing of Financial Services	
Instructions: Answer any five (5) questions of the options given below. All questions carry equal marks		

Question No.		Max. Marks
1	<p>While the pandemic has intensified financial volatility, it has also created an opportunity for Banking and Financial Services (BFS) companies to re-imagine their role in a new normal.</p> <p>The next five years will represent a period of consolidation. Incumbent firms will embrace digital transformation to deepen their capabilities, and maturing FinTechs will explore partnerships that enable them to focus on disruption and customer-focused innovation. Challenging regulatory imperatives, meanwhile, will lead new technologies to be harnessed in tackling rapidly shifting threats and building operational resilience.</p> <p>You are required to discuss the five BFS trends that will change the way businesses function in 2025.</p>	10
2	<p>Sandeep is a 30 years male working in an MNC. His friend has met with a dangerous accident and luckily survived. Seeing his friend in the hospital and the huge hospitalisation bill ... Sandeep is now exploring ways to secure his own life.</p> <p>a. What financial product/s should he buy.</p> <p>b. What are the distribution channels that can provide him the products he is looking for.</p>	10
3	<p>What are Mutual Funds? How big is the MF industry as of Dec 2023.</p> <p>What are the steps that need to be taken to make MF a 100 Tr industry?</p>	10
4	<p>Draw the classification of Financial Markets.</p> <p>Mention its key functions.</p> <p>Detail the role of any 2 regulators in detail.</p>	10
5	<p>What is Potential Service Segmentation? Explain the model for present</p>	10

	day Banks.	
6	What is the Comprehensive Pension System in India. Explain the features of NPS. Detail its Tax impact.	10
7	Why is Compliance important in the BFSI sector. Discuss the 8 important steps to be taken by organisations to build sustenance.	10
8	Explain the below exhibit 15. Details all the factors that have led to reinventing the Sales Funnel.	10

Exhibit 15 – Digital Wealth Managers Reinvent the Sales Funnel

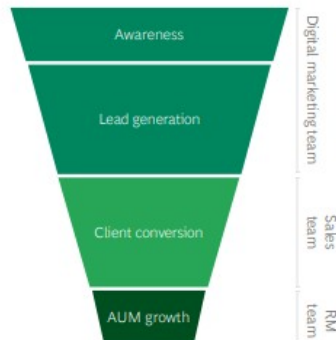
Traditional sales funnel

- Marketing**
- Primarily via nontargeted TV, ads, etc.
- Sales**
- Customer education
 - High-touch model
 - Client's advisor provides information, influences product evaluation, closes sale



Sales funnel of digital wealth managers focused on data-driven sales and efficient conversion and service

- Marketing**
- Data-driven targeted solutions
 - Personalized value proposition
- Sales and conversion**
- Efficient, scoring-based lead conversion
 - Analytics-driven sales and customer engagement
- Relationship management**
- Analytics-driven sales and customer engagement



Source: BCG analysis.

Note: RM = relationship management.