skillcubator
learn and lead

Capital Market Business Analysis Training and Placement Program

COURSE DETAILS DOCUMENT

• LIVE Live - Online  In-person  Private Team Training

Prerequisites

Truly speaking, there are no prerequisites to become a successful Capital Market business analyst. But it would be nice to have the following to become a successful business analyst:

- Basic computing skills (MS Office like Word, Excel and PowerPoint).
- Decent communication skills (verbal and writing in English).
- Comfortable talking to people.
- Normal analytical skills.

The financial services industry is undergoing rapid transformation driven by regulatory changes, evolving market dynamics, and digital disruption. Capital markets—encompassing equity, debt, and derivative instruments—are at the core of global financial transactions. As institutions invest in advanced trading platforms, regulatory compliance systems, and data analytics, the demand for skilled Business Analysts with domain expertise in capital markets has significantly increased.

Business Analysts in capital markets serve as a vital link between business stakeholders and technical teams, helping design and implement systems that support trading, settlement, risk management, and compliance. However, most entry-level and mid-career professionals lack the necessary industry-specific knowledge and practical exposure to effectively contribute to capital markets projects.

The Capital Market Business Analysis Training and Placement Program is designed to bridge this gap. This comprehensive program blends capital markets domain education, business analysis fundamentals, and hands-on training with real-world financial use cases. Participants will gain proficiency in trade lifecycle management, financial instruments, compliance regulations, and tools such as Bloomberg, JIRA, and Power BI. The program also prepares candidates for interviews, resume development, and job placements in roles such as Capital Market Business Analyst, Trading Systems Analyst, and Financial Systems Consultant.

Whether you are transitioning into financial services or seeking to upskill in the domain, this program provides a structured pathway into high-demand roles within investment banks, asset management firms, trading desks, and fintech platforms.

Is This Program Right for You?

This program is ideal for individuals who aspire to build a career at the intersection of business analysis and capital markets. You'll benefit from this program if you:

- You want to transition into Information Technology (IT) field and start your career as Capital Market Business Analyst.
- You are a working professional in banking, accounting, or operations seeking to move into a more strategic or analytical role.
- You are a career returnee or international professional aiming to re-enter the North American job market with domain-aligned skills and placement support.
- You want to gain practical, hands-on exposure to trade lifecycle processes, financial instruments, compliance requirements, and systems used in capital markets.
- You are already working in Information Technology field as either developer, tester, technical writer etc. but want to transition into a business analyst role within capital market business domain.
- You are an entry-level business analyst or lack that confidence and courage to work as a business analyst.

Course Objective:

The objective of the Capital Market Business Analysis Training and Placement Program is to equip participants with the comprehensive domain knowledge, business analysis techniques, and practical tools required to succeed as Business Analysts in the capital markets and financial services industry.

Through a structured curriculum, the program aims to:

- Develop a strong understanding of capital markets, financial instruments, trading lifecycle, and regulatory landscape.
- Build core business analysis skills including requirements gathering, documentation (BRD, FRD, Use Cases, User Stories), stakeholder communication, and agile methodologies.
- Provide exposure to industry-standard tools such as Bloomberg (demo), JIRA, Confluence, Excel, Microsoft Visio, Balsamiq, SQL, and Power BI used in capital markets projects.
- Prepare participants to effectively contribute to technology and business transformation initiatives in investment banks, asset management firms, and fintech companies.
- Support job readiness through resume development, mock interviews, and placement assistance tailored to capital market Business Analyst roles.

By the end of the program, participants will be able to bridge the gap between business needs and technical solutions in capital markets, confidently engage with cross-functional teams, and deliver value in real-world financial projects.

Course Outline

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Module 1

1. **Business Analysis Fundamentals**
    - 1.1. What is business analysis?
    - 1.2. Who is a business analyst?
    - 1.3. Importance of business analyst.
    - 1.4. Real-world business analyst use cases.
    - 1.5. A typical day of a business analyst.
2. **Project Management Overview**
    - 2.1. What is a project?
    - 2.2. What is project management?
    - 2.3. Understanding the 'Iron Triangle'.
    - 2.4. What are the different phases of a project?
    - 2.5. Understanding various knowledge areas and processes within each of them.
    - 2.6. Reviewing key project management artifacts.
    - 2.7. Project scope v/s Product scope.
    - 2.8. Creating 'Project Plan' (schedule) using Gantter tool.
3. **Key Management Concepts**
    - 3.1. Value chain.
    - 3.2. Lean methodology.
    - 3.3. Kanban.
    - 3.4. Poka-Yoke.
    - 3.5. Core Competency.
    - 3.6. Kaizen.
    - 3.7. Business Process Re-engineering.
    - 3.8. Business Process Improvement.
4. **Understanding Stakeholder Landscape**
    - 4.1. Primary v/s Secondary stakeholder.
    - 4.2. Active v/s Passive stakeholder.
    - 4.3. Understanding various types of stakeholders via a live case study.
    - 4.4. What are the different organizational structures?
    - 4.5. Creating 'RACI' matrix using MS Excel.
    - 4.6. Creating 'Organizational Structures' using MS Visio, Lucid Chart, Gliffy, or Visual Paradigm.
5. **Understanding different types of requirements**
    - 5.1. What is a requirement?
    - 5.2. Understanding different types of requirements.
    - 5.3. Business need.
    - 5.4. Stakeholder requirement.
    - 5.5. Functional.
    - 5.6. Non-Functional.
    - 5.7. Interface.

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5.8. Graphical User Interface.
5.9. Business rules.

6. What is Software Development Lifecycle?

6.1. Understanding the different phases of an SDLC.
6.2. Role of a business analyst in each of the SDLC phases.
6.3. Learning and comparing (a) Predictive (b) Iterative and Incremental and (c) Adaptive SDLC models.

7. Reviewing Different Software Engineering Models

7.1. Waterfall.
7.2. Spiral.
7.3. Rapid Application Development (RAD).
7.4. Rational Unified Process (RUP).
7.5. SCRUM (More emphasis will be given on SCRUM).

8. Requirements Lifecycle

8.1. Requirements elicitation.
8.2. Requirements analysis.
8.3. Requirements documentation.
8.4. Solution assessment.
8.5. Requirements management.

Module 2

9. Requirements Elicitation

9.1. What is requirements elicitation?
9.2. Understanding various requirements elicitation techniques.
9.3. Brainstorming.
9.4. Focus Group.
9.5. Requirements Workshops.
9.6. Interviews.
9.7. Questionnaire/Survey.
9.8. Document Analysis.
9.9. Prototyping.
9.10. Pros and Cons of each of the requirements elicitation techniques.

10. Business Requirements Analysis

10.1.SWOT analysis technique.
10.2. RCA (Root Cause Analysis) technique.
10.3. Five whys.
10.4. Fishbone (Ishikawa).
10.5. Business Process Management.
10.6. What is Business Process Management (BPM)?
10.7. What is Business Process Modeling?
10.8. Understanding various business process modeling notations.
10.9. How to create a business process model?
10.10. Creating 'As-Is' (Current State) and 'To-Be' (Future State) business process model using MS Visio/Lucid chart/Gliffy tools.

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10.11. Creating ‘Root Cause Analysis’ diagram using MS Visio/Lucid chart/Gliffy tools.

11. System Requirements Analysis

11.1. What is System Context Diagram?
11.2. Creating System Context Diagram using MS Visio/Lucid chart/Gliffy tools (Hands-On Exercise).
11.3. Object Oriented Concepts.
11.4. What is Unified Modeling Language (UML)?
11.5. Use Case Diagrams.
11.6. Activity Diagrams.
11.7. State Chart/State Machine Diagrams.
11.8. Sequence Diagrams.
11.9. Creating all UML models (mentioned above) using MS Visio/Lucid chart/Gliffy tools.
11.10. What is ‘Functional Requirements Document’ (FRD) and writing FRD using MS Word.
11.11. What is a Use Case Specification?
11.12. Writing a Use Case Specification Document using MS Word (Hands-On Exercise).
11.13. Creating Data Dictionary using MS Word (Hands-On Exercise).
11.14. Creating Business Rules Document using MS Excel (Hands-On Exercise).

12. Scrum

12.1. What is ‘Agile Software Development?
12.2. Understanding various ‘Agile Software Development’ practices/models.
12.3. What is SCRUM?
12.4. What is ‘Agile Manifesto’?
12.5. Different roles in a SCRUM.
12.6. Role of a business analyst in a SCRUM.
12.7. Understanding various ‘Ceremonies’ in a SCRUM.
12.8. Writing Features-Epics-User stories using JIRA tool (Hands-On Exercise).
12.9. Writing ‘Acceptance Criteria’ using Gherkin syntax (Given-When-Then) using JIRA tool (Hands-On Exercise).
12.10. How to estimate a user story and add user story attributes in a JIRA tool (Hands-On Exercise)?
12.11. What is team velocity?
12.12. Understanding burndown/burnup chart and how to create using MS Excel and/or JIRA tool.
12.13. How to initiate, execute and close sprints/iterations using JIRA tool using JIRA tool? (Hands-On Exercise).
12.14. Various techniques on splitting an EPIC into small user stories.
12.15. How to create wireframes/mockups using Balsamiq tool?

13. Structured Query Language (SQL)

13.1. What is database?
13.2. What is a table (column/row) in a database?
13.3. What is Entity Relationship Diagram (ERD)?
13.4. How to create an ERD diagram using Visio? (Hands-On Exercise).
13.5. Understanding database schema.
13.6. What is datatype?
13.7. What is SQL?
13.8. Write SQL queries (Hands-On Exercise).

Module 3

14. Requirements Management

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14.1. What is requirements management?
14.2. Understanding 'Requirements Management Plan' (RMP)
14.3. What is Requirements Traceability Matrix (RTM)?
14.4. Creating an RTM using DOORS/ MS Excel tool (Hands-On Exercise).

15. **Requirements Estimation**
    15.1. Why to estimate requirements and importance of estimating software requirements?
    15.2. Overview of different software requirements estimating models.
    15.3. Understanding 'Industry Best Practices' to estimate a requirement.
16. **Configuration Management**
    16.1. What is configuration management?
    16.2. Benefits of configuration management.
    16.3. Applying CM using tortoise SVN tool (Hands-On Exercise).
17. **Change Control**
    17.1. What is change control board (CCB)?
    17.2. Role of a business analyst in a CCB process.
18. **Quality Assurance**
    18.1. What is quality assurance?
    18.2. Different types of testing models.
    18.3. Role of a business analyst in quality assurance/testing phase.
19. **Miscellaneous Topics**
    19.1. What is Service-Oriented Architecture?
    19.2. What is Cloud Computing and various cloud computing models?
    19.3. What is Business Process Model and Notation (BPMN)?
    19.4. Creating BPMN model using MS Visio tool (Hands-On Exercise).

Capital Market

Module 1

1. **Introduction To Capital Markets**
    1.1. Overview of Financial Services Industry.
    1.2. What Is The Difference Between Commercial And Investment Banking?
    1.3. What are Capital Markets?
    1.4. Primary v/s Secondary Market.
    1.5. Key Stakeholders In Capital Market: Retail Investors, Institutional Investors, Brokers, Dealers etc.
    1.6. Market Segments: Equity, Debt, Derivatives and Foreign Exchange (Forex).
2. **Financial Instruments and Products**
    2.1. Equity Instruments: Stocks, Exchange Traded Funds (ETFs), Initial Public Offerings (IPOs).
    2.2. Debt Instruments: Bonds, Debentures, Commercial Papers.
    2.3. Derivatives: Futures, Options, Swaps, and Forwards.
    2.4. Mutual Funds, Hedge Funds, Private Equity.
    2.5. Structured Products & Securitization.

Module 2

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3. **Trade Lifecycle And Settlement Process**
    - 3.1. Order Management Systems (OMS).
    - 3.2. Execution Management Systems (EMS).
    - 3.3. Trade Lifecycle Stages: Order, Execution, Clearing, Settlement, Reconciliation.
    - 3.4. Front Office, Middle Office, Back Office Functions.
    - 3.5. Settlement Types: T+1, T+2.
    - 3.6. Clearinghouses and Custodians.
4. **Capital Market Systems and Tools**
    - 4.1. Order Management System (Overview of Fidessa, Charles River).
    - 4.2. Trading Platforms (Overview of Bloomberg, Eikon).
    - 4.3. Post-Trade Systems (Overview of DTCC, SWIFT).
5. **Financial Data & Reference Data Management**
    - 5.1. Market Data v/s Reference Data.
    - 5.2. Pricing Feeds: Bloomberg, Reuters, ICE.
    - 5.3. Data Governance in Capital Markets.
6. **Reporting and Analytics**
    - 6.1. Regulatory Reporting: Trade Surveillance, Audit Trails.
    - 6.2. Risk and Compliance Dashboards.
    - 6.3. Financial KPIs and Metrics for Bas.
    - 6.4. Tools for Reporting (Excel, Power BI).
7. **Real-World Case Studies**
    - 7.1. Equity Trading Platform Revamp.
    - 7.2. Bond Trading System Integration.
    - 7.3. FATCA Compliance Implementation.
    - 7.4. MIFID II Regulatory Reporting System.
    - 7.5. Asset Management Portfolio Dashboard.
8. **Resume Building & Job Placement**
    - 8.1. Resume and LinkedIn Optimization for Capital Market BA Roles.
    - 8.2. Mock Interviews with Domain Scenarios.
    - 8.3. Behavioral Interview Coaching (STAR Method).
    - 8.4. Real Job Description Analysis.
    - 8.5. Recruiter Connect and Networking.

Features

- Training Program as per Latest Industry Demand
- IIBA Endorsed Education Provider
- Access to Learning Management System (LMS)
- Free PSM-I and PSPO-I training included in the package
- 40 PDUs/CDUs
- IIBA Certified Instructors with 20 plus years of experience
- Plenty of case studies, In-Class exercises, quizzes, and take-home assignments
- 10 Plus Industry-Standard tools
- Personalized Resume, LinkedIn Profile makeover and Cover Letter
- Course aligned to IIBA's BABOK 3.0 and PMI's body of knowledge
- Comprehensive Capstone project

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- Experiential learning through case studies

Software/Tools Used for this training

Business Analysis Software	Capital Market Software
• Microsoft Office (Word, Excel, PowerPoint). • Microsoft Visio, Gliffy, Lucidchart. • Bizagi, Camunda, Bonita, Signavio, Draw.io. • Microsoft Project, Product Plan, Gantter. • Balsamiq, Mockflow. • Jira. • Confluence. • Tortoise SVN. • Oracle. • Kanbantool, backlog.com, or similar Kanban tool.	• Bloomberg. • SWIFT. • Charles River. • Fidessa. • DTCC.

[Please Note: Some of the software(s) used in trading are only accessible to employees via proper authentication and authorization protocols. In that case, Skillcubator will arrange for a demo and/or content, which is available in the public domain without violating copyright and/or confidentiality agreements]

Duration	Fees

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Business Analysis Sessions:

- 10 weeks (Monday, Tuesday, and Thursday from 8:00 PM EST to 10:00 PM EST).
- Core Training Hours: 50 hours.

Capital Market Sessions:

- 8 weeks (Saturday and Sunday from 08:00 AM EST to 11:00 AM EST).
- Core Training Hours: 30 hours.

[Please Note: Exact schedule is finalized based on the Instructor and trainees' availability]

1500 USD + 5.3% Sales Tax

(13.5% GST is applied instead of 5.3% for Canadian candidates).

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