



***Sandip Foundation's
Sandip Institute of Technology & Research Centre, Nashik
Department of Management Studies
Academic Year 2018-19
Report on Guest Lecture***

Event Title: - Guest Lecture on “Equity Markets & Financial Planning”

Date: - 25th September 2018

Conduction Duration: 02 Hrs

Venue: MBA-II Finance Class Room, SITRC

Resource Person:

1. Mr. Vineet Gupta, Vice President, Tickerplant ltd

Coordinator: Prof Jeevan Ahire

Objective:

- 1. To study the importance of Financial Planning.***
- 2. To understand the various investment avenues available for investing.***

About The Program:

*Department of Management Studies had organized guest lecture on Equity Markets & Financial Planning for MBA –II students. The session was conducted by **Mr. Vineet Gupta, Vice President, Tickerplant ltd.** The session began with introduction of Financial Management and what is financial planning, he explained the definition of Financial Planning, as the process of estimating the capital required and determining its competition. He further added that financial planning is the process of framing the financial policies in relation to procurement, investment and administration of funds of an enterprise. The speaker also spotlighted the importance of financial planning and why one has to do financial planning. It provides adequate funds to be ensured for future. Financial planning also helps in ensuring a reasonable balance between outflow and*

inflow of funds so that the stability is maintained. Financial planning reduces the uncertainties with regards to changing markets trends which can be faced easily through enough funds.

The speaker further explained the different avenues available for the investment such as PPF, Bank FD's, Mutual Funds, Stock Markets, Insurance and etc. And further he explained in detailed about the equity market. He focused on stock markets in dept and how it plays an important role in maintaining a healthy portfolio. The speaker flashed light on the importance of investing, he also said that assessing the investment periodically is too a vital scenario for wealth creation.

Outcome:

- 1. Students learnt about the significance of Financial Planning.***
- 2. Students understood different investment avenues available for investing to build a strong portfolio.***

Photograph:



