



**Sandip Foundation's
Sandip Institute of Technology & Research Centre, Nashik
Department of Management Studies
Academic Year 2021-22**

Guest/Expert Talk Lecture on “Introduction to World of Investment & Mutual Funds”

Event Title: “Guest Lecture on “Introduction to World of Investment & Mutual Funds”

Date: 28th January 2022

Conduction Duration: 2Hours

Venue: Virtual Platform of Google Meet

Resource Person:

1. Mr.Swetav Tripathy (Sales & Softs Skills Trainer, Certified Train The Trainer)

Coordinator: Prof Prabodhan Patil

Objective:

- 1. To Introduce the Students to the world of Investments***
- 2. To create Awareness regarding Mutual Funds among students***

About The Program:

Department of Management Studies had organized an guest lecture session on ***“Introduction to World of Investment & Mutual Funds”*** for MBA Students. The Guest speaker for the same was ***Mr.Swetav Tripathy*** who is a Certified trainer recognized by SEBI & also is Sales & Soft skills Trainer .Speaker enlighten the students on different virtue & facets of Investments World , Importance of Financial Planning, and Introduce to students to Concept of Mutual Funds. His Session can be summarized in following way

A) Importance of Financial Planning

- It provides direction to your goals or dreams.
- You plan your budget in a better manner.
- Financial planning makes you disciplined towards money.
- By planning your finances, you plan for the future.

B) Point to be kept in Mind during Financial Planning

- 1. Income
- 2. Expenses
- 3. Savings
- 4. Investment
- 5. Taxation
- 6. Retirement
- 7. Estate Planning
- 8. Ups and downs of Financial Status

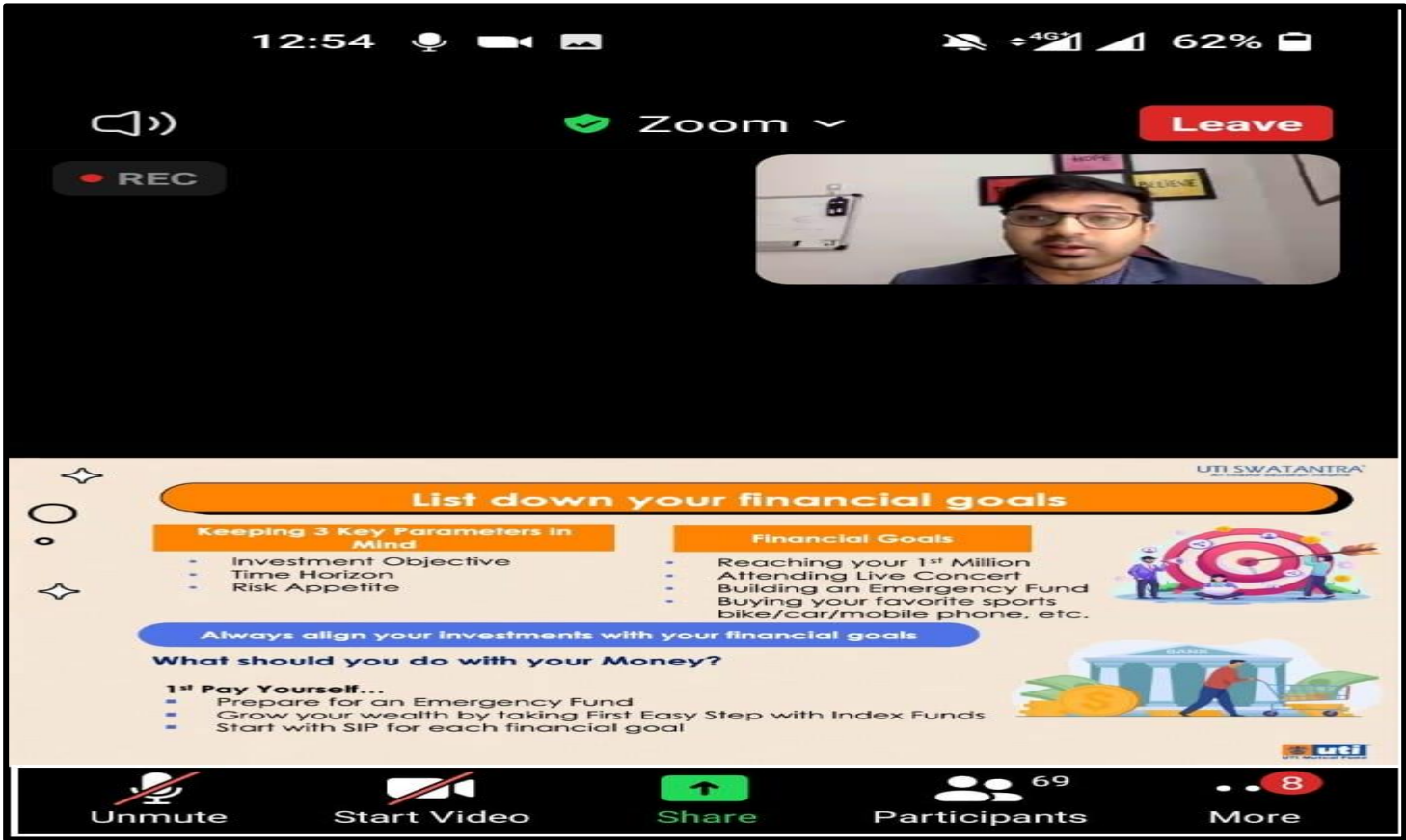
C) MUTUAL FUNDS, History of Mutual Funds , & Why Invest in Mutual Funds

Outcome:

1. Students came to know about various Alternatives of Investments

2. Students also got insight about Mutual Funds

Photographs:



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What do you do with your money

Save

Spend

Invest



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UTI Mutual Fund

SWETAV TRIPATHY's screen

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What's Wrong with Just Saving?

- Inflation eats up your savings over time!
- Inflation causes price escalation of goods and services we consume.



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UTI Mutual Fund

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Benefits of Investing

To achieve our **financial goals** & grow our money, we should Invest our money in appropriate avenues.
(Mutual Funds, ETF's, Gold, etc.)

Investing helps in :

- Beating Inflation
- Benefit from power of compounding
- Rupee cost averaging
- Wealth creation
- Save taxes
- Building discipline of regular investing




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UTI Mutual Fund


SWETAV TRIPATHY's screen

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Difference between saving and investing




Saving focuses on **accumulation** and **safety** of our money.



Investing revolves around **growing our money by taking calculated risks** in line with our financial goals.

But **ONLY** saving our money is not enough. Let's know why...



SWETAV TRIPATHY's screen

SWETAV TRIPATHY

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Various Options for Achieving your Financial

Real Estate

Mutual Funds


Gold


Insurance

Stocks

Bonds

Bank Deposits





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What are Mutual Funds?

INVESTORS

POOL THEIR MONEY

FUND MANAGER


INVEST IN


STOCKS/ SECURITIES

HELPS GENERATE

RETURNS

DELIVERED TO





SWETAV TRIPATHY's screen

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Why invest in Mutual Funds

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