



**DR S.C. GULHANE PRERNA COLLEGE
OF
COMMERCE, SCIENCE & ARTS**

Reshimbag, Nagpur.
(Run By Prerna Sewa Mandal)

NAAC Accredited with "B Grade"



Department of Commerce & Management

And

Prerna Business Enterprenureship & Incubation Centre Committee

Jointly Organizing

**A CERTIFICATE COURSE IN FUNDAMENTALS OF
INVESTMENT MANAGEMENT**

8th Feb - 20th Feb 2024

10:30 am - 1:30 pm

HON'BLE RESOURCE PERSON



MS. ARTI GOSWAMI

HRM

**Prerna Sewa Mandal,
Nagpur**



DR S. C. GULHANE
Secretary

Prerna Sewa Mandal, Nagpur



DR PRAVIN JOSHI
Director

Dr s. c. Gulhane Prerna College of
Commerce, Science & Arts, Nagpur



MS. ABHILASHA GUDADHE
CEO

Prerna Sewa Mandal, Nagpur



DR RATNA SARKAR
Principal

Dr s. c. Gulhane Prerna College of
Commerce, Science & Arts, Nagpur

MR. GAURAV GAJBE
CO-ORDINATOR



Dr S.C. Gulhane Prerna College of Commerce, Science and Arts


Run by Prerna Sewa Mandal
Reshimbag Square, Nagpur-24

Govt Recognized and Affiliated to Rashtrasant Tukadoji Maharaj Nagpur University
NAAC (UGC) ACCREDITED INSTITUTION 'B' GRADE (CGPA-2.32)
Ph.: 2745296, 2746840 E-mail: prernacollegengp@gmail.com



SYLLABUS

- What is Investment? What is SEBI? What is primary and secondary investment)
- What are Stocks and its Credentials
- What are Bonds
- Let us know about Recurring Deposits
- National Pension Scheme
- Debentures
- What are Financial Derivatives and Financial Forecasting
- Portfolio Management
- Mutual Fund and SIP
- Importance of D-mat account and How to trade in stock exchange
- Inflation, Hedging


Program Coordinator
Dr. S. C. Gulhane Prerna College of
Commerce, Science & Art's, Nagpur.



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OF COMMERCE, SCIENCE AND ARTS
NAGPUR

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Reshimbag Square, Nagpur – 24

(Run by PRERNA SEWA MANDAL, Regd. No. Sr Act 1860-370/83, BPT Act – 1950. F/3826)

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Ref. No.:

Date: 06-02-2024

To

Ms. Arti Goswami

Human Resource Manager,

Prerna Sewa Mandal,

Nagpur, MH

Subject: Invitation as a Resource Person.

Dear Sir,

Department of Commerce & Management of Dr S. C. Gulhane Prerna College of Commerce, Science and Arts organizing A ten-day Certificate Course in '**Fundamentals of Investment Management**' in the New Building at 10.30 am to 01.30 pm. From 8th Feb 2024 to 20th Feb 2024. You are requested to become a Resource Person for this ten-day certificate course.

Kindly accept our request and oblige us

DR S.C. GULHANE PRERNA COLLEGE
OF COMMERCE, SCIENCE AND ARTS
NAGPUR

Dr Pravin Joshi

Director



Dr S.C. Gulhane Prerna College of Commerce, Science and Arts


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REPORT

Department: Commerce and Management

Program: Certificate course in Fundamentals of Investment Management

Resource Person: Ms. Arti Goswami, HR Manager of Prerna Sewa Mandal

Date and Time: 8th February to 27nd February 2024 from 10:30 am to 1:30 am.

Objectives: -

1. To make students understand about the importance of Investment Management.
2. To grasp all the important aspects of Investment Management to remove all the doubts relating to Investment Management
3. To cover all the aspects of Investment Management right from the basics of it to advanced concepts.
4. To know various definition and concept included in Investment Management.
5. To make students aware about the need of Investment Management.
6. To make students interested in Investment Management.

Highlights: -

- **Day 1 (Topic: What is Investment? What is SEBI? What is primary and secondary investment)**
Ms. Arti Goswami conducted an introductory session on Investment Management in her talk she explained meaning, definition and features of Investment, she also gave a brief explanation about SEBI and its working.
- **Day 2 (Topic: What are Stocks and its Credentials?)**
Ms. Arti Goswami in her talk explained about stocks and also explained that stock is a share of ownership of a company which will give dividend in return. She also told about the types of stock 1) Common stock and 2) Preferred stock
- **Day 3 (Topic: What are Bonds?)**
The resource person explained the difference between stocks and bonds, she further explained the meaning, definition of bonds. Bonds are money lent to institution for which one is entitled to receive interest
- **Day 4 (Topic: Let us know about Recurring Deposits)**

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Ms. ArtiGoswami explained in her session explained that Investment management have wider scope as it cover recurring deposits which is a low risk investment tool gives moderate and assured returns.

- **Day 5 (Topic: National Pension Scheme)**

Ms. ArtiGoswami in very simple way made the students understand what is National Pension Scheme, its meaning, benefits and also about the NPS investment choices.

- **Day 6 (Topic: Debentures)**

Ms. ArtiGoswami in her session explained about debentures that it is kind of debt instruments which is unsecured, its uses in various sector and also about various types of debentures like Redeemable, Non Redeemable, Convertible, Non Convertible.

- **Day 7 (Topic: What are Financial Derivatives and Financial Forecasting?)**

Ms. ArtiGoswami explained meaning, importance of Financial Derivatives and Financial Forecasting in Investment Management.

- **Day 8 (Topic: Portfolio Management)**

Mr Pranav Pawar, a financial planner joined online session, explained about what is portfolio, how to create an portfolio, why portfolio diversification is important in his session.

- **Day 9 (Topic: Mutual Fund and SIP)**


Mr Shantanu Agarwal, a financial planner joined online session, explained about Mutual Funds, investment strategies, importance of mutual fund, how and why to invest in Mutual Funds and SIP and its long term benefits.

- **Day 10 (Topic: Importance of D-mat account and How to trade in stockexchange?)**

Mr. Swapnil Deogade Conducted the session of what is D-Mat account, how to open an D-Mat account and how to do trading.

- **Day 11 (Topic: Inflation Hedge)**

Ms. ArtiGoswami explained meaning of inflation hedging where the effects of inflation was explained as it rises the prices of goods and services at long run.


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Valedictory Function:

1. On this occasion Mr. Mumtaz Ali Tayaab Owner and Promoter of Ali Financer Ltd and Mr Salim khan, was the chief guest. Hon'ble Dr S. C. Gulhane the Scretary of PrernaSewa Mandal was chairperson. CEOof PrernaSewa Mandal Ms. AbhilashaGuddhe,Director Dr Pravin Joshi, Principal Dr Ratna Sarkar, and HR Manager Ms. ArtiGoswami were prominently present.
2. Ms Pooja Gadwecompared the program.
3. Director Dr Pravin Joshi and Secretary Dr S. C. Gulhanewelcomed Mr.Mumtaz Ali Tayaabby offering floral bouquetand a memento as a token of love and respect.
4. Dr Pravin Joshi in his introductory remarks explained the importance of financial planning and also about social investment.
5. Dr S. C. Gulhnaecongratulated the studentsfor their successful completion of certificate course.
6. The students were awarded with certificates for their participation by Dr S. C. Gulhane sirand Mr.Mumtaz Ali Tayaab
7. Mr.Mumtaz Ali Tayaab enlightened the students with his inspiring words and told the students the importance of investment and saving for their future.
8. Finally, Ms.SakshiShivhareproposed a formal vote of thanks.

Outcomes: -

1. Students got information on various necessary topics on Investment Management.
2. Students learnt concept of Mutual Funds and SIP Management.
3. Students came to know about commercial skills like Bonds,Debenture, Recurring Deposits required for today'sInvestmentindustry.
4. Students became aware about the wide range of sectors including portfolio Management, National Pension Scheme, FinancialDerivatives and Financial Forecasting of Investment Management.
5. Students got to know about the ethical and practical aspects of Investment Management.
6. The course helped students to know importance of Investment Management.

No. of Beneficiaries - 89


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Glimpses of Certificate Course in Investment Management



S. C. Gulhane
Program Coordinator
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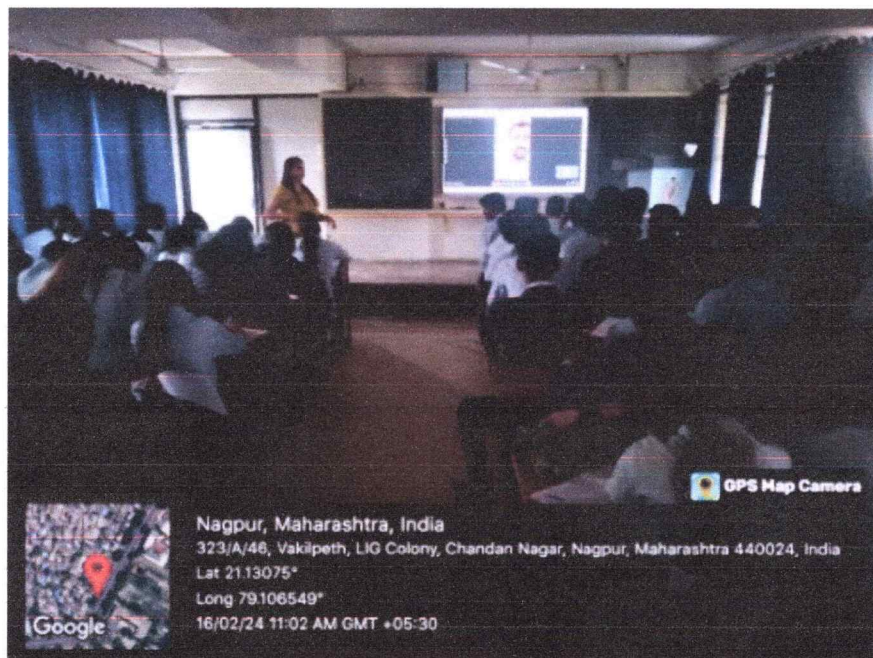
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GPS Map Camera



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Dr. S. C. Gulhane
Program Coordinator

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