

Date: June 30, 2021

## **Report** “Webinar on Capital Market Awareness”

The crux of wealth building is investment in various avenues and earning return on investment (ROI) that can beat the inflation rate. Considering this, the Institute organised a webinar on “Capital Market Awareness” in association with Lotus Knowlwealth Pvt. Ltd under the Bombay Stock Exchange (BSE) - Investor Education Program (IEP) on June 30, 2021. The objective of the webinar was to give an insight to the participants about the significance of selecting investment options on the basis of risk - returns, creating awareness and enhancing the knowledge for capital market investment options.

The expert speaker, Mr. N. Mahesh Kumar, discussed the difference between saving and investment, power of compounding, importance of personal financial planning, basic features of different asset classes along with related risk and return, does & don'ts of a prudent investor as well as obligations of investors.

Expert speaker, Mr. N. Mahesh Kumar and Director, Dr. Bharat Kasar answered the queries & doubts of the participants related to various investment avenues and their operational aspects.

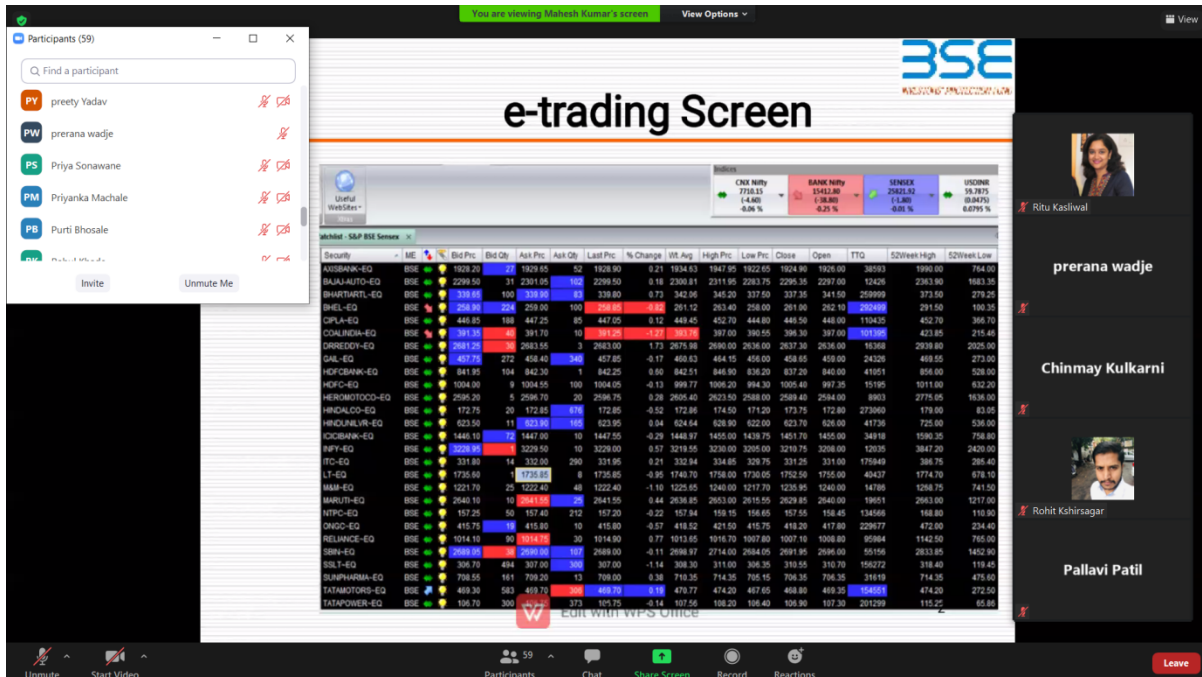
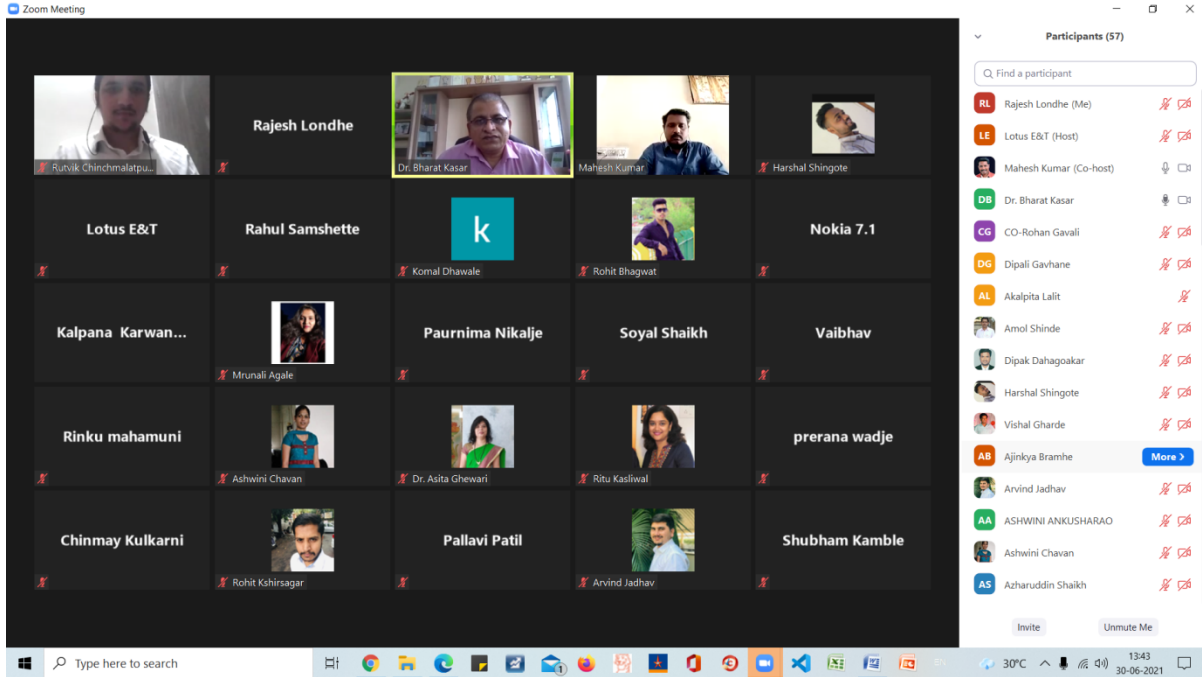
The webinar started with the opening remarks of Director, Dr. Bharat Kasar. The webinar was attended by 66 students of UG & PG courses along with faculty members from various educational institutes. The webinar was anchored by Mr. Rutvik Chinchmalatpure and Mr. Rohit Kshirsagar, student of MBA I year.

**Prof. Ritu Kasliwal**  
**(Webinar Coordinator)**

**Dr. Bharat Kasar**  
**(Director)**

# Photos

## “Webinar on Capital Market Awareness”



Zoom Meeting | You are viewing Mahesh Kumar's screen | View Options

Ritu Kashwal | Mahesh Kumar | Lotus E&T | Shital Jawade | Rahul Samshette | Komal Dhawale

### Basic Features of Asset Classes

| ASSET CLASS            | Return | Safety | Liquidity | Recurring/ Incidental/ Storing Costs | Investment Size | Periodic Income | Tax Exemption                      |
|------------------------|--------|--------|-----------|--------------------------------------|-----------------|-----------------|------------------------------------|
| <b>EQUITY/MF</b>       | High   | Low    | High      | Low                                  | Low             | Yes             | STCG -15%<br>LTCG- Profit > 1 lakh |
| <b>GOLD</b>            | Medium | Low    | High      | Medium                               | Low             | No              | No                                 |
| <b>BANK FD</b>         | Low    | High   | High      | Low                                  | Low             | No              | No                                 |
| <b>COMPANY FD/ NCD</b> | Medium | Medium | Low       | Low                                  | Medium          | No              | No                                 |
| <b>LAND/ FLAT</b>      | High   | Low    | Low       | High                                 | High            | Yes             | No                                 |
| <b>PPF/</b>            |        |        |           |                                      |                 |                 |                                    |

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Zoom Meeting | Mahesh Kumar is talking...

### Mutual Fund – Type of Schemes

**SCHEME TYPE**

- Investment**
  - Equity
  - Sectoral
  - Indices Based
  - Thematic
  - Tax Saving (ELSS)
  - Debt / Money Market
  - Liquid
  - Short Term
  - Long Term
  - Hybrid / Balanced
  - Gold
  - International Funds
- Collection**
  - Open Ended
  - Close Ended
- Options**
  - Growth
  - Dividend
  - Dividend Reinv.
- Other Scheme Plans**
  - Direct
  - Regular

Dr. Bharat Kasar | Rupali Joshi | Jancy JAYADAS | Nikhil Mohite

DIPAK DAHAGA... | preety Yadav | Komal Athaw... | Priyanka Machale

Rajiv Bhor | Rahul Khade | MAHENDRA... | Dipali Khawale

Grishma Chau... | Pooja Nimbalkar | Rajesh Londhe | Dipali Gavhane

Akalpita Lalit | Vishal Gharde | Amol Shinde | dhananjay kam...

Soyal Shaikh | Sarika Kadam | Kaustubh Bhavsar | Kevin Kumar


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Zoom Meeting

Mahesh Kumar is talking...

### Financial Planning - Key Aspects

- Financial Goals
  - Buying a house
  - Children's Education
  - Children's Marriage
- Insurance Planning
- Tax Planning
- Retirement Planning



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|                   |                  |                   |                   |
|-------------------|------------------|-------------------|-------------------|
| Amol Shinde       | dhananjay kam... | Soyal Shaikh      | Kaustubh Bhavsar  |
| Kevin Kumar       | 1fN4v0S5thieC... | Azharuddin Sha... | Priya Sonawane    |
| Shital Jawade     | Pallavi Gaikwad  | Rajiv Bhor        | Neha Waghim...    |
| Divya Suryawan... | Redmi S          | prerana wadje     | Sayali Waghmare   |
| pradnya Gharde    | Janhavi Panda... | Nikita Adsul      | Priyanka Koka...  |
| Suvarna Biradar   | CO-Rohan Gavali  | Vaibhav           | Rutvik Chinchm... |

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Zoom Meeting

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EN English (India)

### Obligations of Investors

- Under Obligation To -
  - Execute Know Your Client (KYC) documents and provide supporting documents
  - Understand the voluntary conditions being agreed with the member
  - Understand the rights given to the Members
  - Read Risk Disclosure Document
  - Understand the product and operational framework and deadlines
  - Pay margins
  - Pay funds and securities for settlement on time
  - Verify details of trades
  - Verify bank account and DP account for funds and securities movement
  - Review contract notes and statement of account

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Mahesh Kumar

Dr. Bharat Kasar

Rajesh Londhe

Lotus E&T

Rahul Samshette

Komal Dhawale

Participants (63)

Find a participant


- RL Rajesh Londhe (Me)
- LE Lotus E&T (Host)
- Mahesh Kumar (Co-host)
- DG Dipali Gavhane
- 1fN4v0S5thieC... 901SChu...
- AL Akalpita Lalit
- Amol Shinde
- CG CO-Rohan Gavali
- DK dhananjay kamble
- DK Dipali Khawale
- DS Divya Suryawanshi
- DB Dr. Bharat Kasar
- KS Kamal Supnar
- KB Kaustubh Bhavsar
- Kavita Sawant
- KK Kevin Kumar

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### Words by Warren Buffet



- On Earning: "Never depend on single income. Make investments to create a second source".
- On Spending: "If you buy things you do not need, soon you will have to sell things you need".
- On Savings: "Do not save what is left after spending, but spend what is left after saving".
- On Taking Risk: "Never test the depth of river with both the feet".
- On Investments: "Do not put all eggs in one basket".
- On Expectations: "Honesty is very expensive given do not expect it from cheap people".


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**THANK YOU!!**

**INVESTING IS A FULL TIME ACTIVITY**

**THERE IS NO SHORT CUT TO MAKING MONEY**



Talk with World Office



Rohit Khirsagar

**Participants (49)**

Find a participant

- RL Rajesh Londhe (Me) 🔊 📺
- LE Lotus E&T (Host) 🔊 📺
- 👤 Mahesh Kumar (Co-host) 🔊 📺
- 👤 Rohit Khirsagar 🔊 📺
- 1 1fN4v0S5thieCOyZU\_901SChu... 🔊 📺
- AL Akalpita Lalit 🔊 📺

Invite Unmute Me

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**Chat**

From Ritu Kasliwal to Everyone:

Please fill the feedback form <https://forms.gle/a1q7CQWuek1Q3cNzB8>

From MAHENDRA GANGAWANE to Everyone:

you want to say that we have to invest dead money only

To: Everyone 📎 📎

Type message here...