

**BUNTS SANGHA'S
S.M. SHETTY COLLEGE OF SCIENCE, COMMERCE AND
MANAGEMENT STUDIES, POWAI.
Permanently Affiliated to University of Mumbai
NAAC ACCREDITED 'A' GRADE
IMC RBNQ CERTIFICATE OF MERIT 2019
ISO 21001:2018 CERTIFIED**

**DEPARTMENT OF COMMERCE AND ALLIED SUBJECTS
ALUMNI SESSION ON 'EQUITY MUTUAL FUND VS DIRECT EQUITY'
ACTIVITY APPROVAL FORM**

Department: COMMERCE AND ALLIED SUBJECTS

Programme: ALUMNI SESSION

Objectives: Guiding students about the Mutual Fund and Direct Equity and also making them understand the best investment options.

Need: Guiding students about various investment opportunities available in the stock market

Content: Session on Equity Mutual Fund Vs Direct Equity

Resource Person: Mr. Ditesh Palan (Alumni BAF Department)

Date: 30th September, 2021 Time: 4.00pm-5.00pm

Venue: Zoom meetings

Cost/Budget: NIL

Proposed by: Ms. Sahana Raviprasad – Coordinator -BAF&BBI


The University of Mumbai

Verified by: Dr. Sridhara Shetty – Principal



BUNTS SANGHA'S
S.M. SHETTY COLLEGE OF SCIENCE, COMMERCE AND
MANAGEMENT STUDIES, POWAI.
Permanently Affiliated to University of Mumbai
NAAC ACCREDITED 'A' GRADE
IMC RBNQ CERTIFICATE OF MERIT 2019
ISO 21001:2018 CERTIFIED

MINUTES OF THE MEETING

Date: 24/09/2021

Time: 12.45pm

Following discussions were made:

1. It was decided to organise the Alumni session on Equity Mutual Fund Vs Direct Equity on 30th September,2021.
2. It was decided by all the members of the department to invite Mr. Ditesh Palan (Alumni of BAF department) as resource person for the session.
4. Duties of the teachers with respect to the above event were explained to them.



Coordinator's Signature

**BUNTS SANGHA'S
S.M. SHETTY COLLEGE OF SCIENCE, COMMERCE AND
MANAGEMENT STUDIES, POWAI.
Permanently Affiliated to University of Mumbai
NAAC ACCREDITED 'A' GRADE
IMC RBNQ CERTIFICATE OF MERIT 2019
ISO 21001:2018 CERTIFIED**

NOTICE


Greetings To All 🙏

The Department of BAF & BBI of Bunts Sangha's S.M.Shetty College of Science, Commerce and Management Studies, Powai.

🌟 Present Alumni Session On 🌟

💰 \$ Equity Mutual Fund vs Direct Equity 💰

RESOURCE PERSON:- Mr. Ditesh Palan
(BAF Alumni 2017-18 batch)
(Post graduate in Financial Management NMIMS)

 **DATE:- 30th September, 2021**

 **TIME:- 4:00pm to 5:00pm**

 **VENUE:- Zoom Meetings**

No registration fees ✕

Join Zoom Meeting

<https://zoom.us/j/96144478219?pwd=aZiZ213cmIDdm02UUdqU0xIVGNPUT09>

Meeting ID: 961 4447 8219

Passcode: DALM

-Regards

Department of BAF & BBI



**BUNTS SANGHA'S
S.M. SHETTY COLLEGE OF SCIENCE, COMMERCE AND
MANAGEMENT STUDIES, POWAI.**

Permanently Affiliated to University of Mumbai

NAAC ACCREDITED 'A' GRADE

IMC RBNQ CERTIFICATE OF MERIT 2019

ISO 21001:2018 CERTIFIED

BROCHURE



**Bunts Sangha's
S.M.Shetty College of Science, Commerce &
Management Studies, Powai, Mumbai-76
Permanently Affiliated to University of Mumbai
NAAC Accredited 'A' Grade
IMC RBNQ CERTIFICATE OF MERIT 2019
ISO 21001:2018 Certified**



Department of BAF & BBI

Presents

Alumni Session On

**EQUITY MUTUAL FUND
VS**

DIRECT EQUITY

RESOURCE PERSON:

MR. DITESH PALAN

(BAF Alumni 2017-18 Batch)

Post graduate in Financial Management NMIMS

Date: 30th September, 2021

Time: 4.00pm to 5.00pm

Venue: Zoom Meetings



No Registration Charges

BUNTS SANGHA'S
S.M. SHETTY COLLEGE OF SCIENCE, COMMERCE AND
MANAGEMENT STUDIES, POWAI.
Permanently Affiliated to University of Mumbai
NAAC ACCREDITED 'A' GRADE
IMC RBNQ CERTIFICATE OF MERIT 2019
ISO 21001:2018 CERTIFIED

REPORT

Event: Alumni session

Topic: Equity Mutual fund Vs. Direct Mutual Fund

Date: 30th September, 2021

Timing: 4.00pm-5.00pm

VENUE: ZOOM Meetings

SCOPE: ALL UNDERGRADUATE STUDENTS OF BAF & BBI DEPARTMENT

Resource person: Mr. Ditesh Palan [BAF Alumni session 2017-18] and a post graduate in financial management NMIMS]

Objective: To orient and guide the students about investing in Equity mutual funds & stocks.

Highlights: The session started with the general welcome by Asst. Prof. Swati Shetty, followed with introduction of the resource person by Asst. Prof. Niveditha Shetty. The resource person, Mr. Ditesh Palan, started with brief introduction about Equity- mutual funds with some live examples for better understanding. He shared his personal experience about how he started investing in stocks & mutual funds when he was an undergraduate student. He made sure that there is no confusion among the participants related to the Equity mutual funds vs. Direct Equity by showcasing of some practical examples which was followed by a short question answer session for clarification of doubts. There were total 64 participants in the session. All the information conveyed by the resource person Mr. Ditesh Palan was very helpful and interesting to all of them. Session came to an end with the vote of thanks proposed by Prof. Sahana Raviprasad, the Coordinator of BAF & BBI Department.



Asst. Prof. Sahana Raviprasad
Coordinator of BAF & BBI

**BUNTS SANGHA'S
S.M. SHETTY COLLEGE OF SCIENCE, COMMERCE AND
MANAGEMENT STUDIES, POWAI.
Permanently Affiliated to University of Mumbai
NAAC ACCREDITED 'A' GRADE
IMC RBNQ CERTIFICATE OF MERIT 2019
ISO 21001:2018 CERTIFIED**

PHOTOS



MUTUAL FUNDS TAKE your PICK

Mutual funds offer a wide variety of product types to choose from. They can be classified as:

- On the basis of scheme structure:
 - Open Ended Schemes
 - Close Ended Schemes
 - Hybrid Schemes
- Based on asset class in which the scheme invests:
 - Equity Schemes
 - Debt Schemes
 - Hybrid Schemes

(All three can be Open Ended or Close Ended)

FUNDS BASIS SCHEME STRUCTURE

- OPEN ENDED SCHEMES**
 - Are always open to investors
 - Can buy or sell units on a continuous basis
- CLOSE ENDED SCHEMES**
 - Have a lock-in period. May vary from 3 - 5 years depending on the scheme objective

FUNDS AS PER THE ASSET CLASS

EQUITY SCHEMES

Suitable for long term investment

- Can focus on individual sector or diversify across sectors
- Certain schemes can also help save tax
- Certain schemes invest in global markets

DEBT SCHEMES

Aim to add stability to your equity portfolio and

- Invest in interest bearing securities like Govt Corporate Bonds, Money Market Instruments
- Some schemes provide easy liquidity suitable to park surplus cash for short term
- Some schemes provide investment opportunities across different time periods
- Some schemes try to benefit from changing interest rates

HYBRID SCHEMES

Provide blend of both equity & debt


- Invest in range of securities like stocks & bonds depending upon the scheme objective
- There are also schemes that allow you to invest in gold units.

With such varied products and schemes, Mutual Funds are ideal to meet the long, medium or short term financial needs with different risk appetite.


ALWAYS PLAN AND INVEST CORRECTLY!

EQUITY MUTUAL FUND VS DIRECT EQUITY

- A Mutual Fund is like a bus! You are one among many participants or passengers. Your job is to trust the fund manager or the driver while he manages your and other participants' monies
- Relative to a car, the journey in a bus is safer but slower. Moreover, the driver is driving and you are not really putting in a lot of effort. Likewise, mutual funds do not deliver returns as high as shares or stocks, but the returns are more likely to be predictable to a greater extent



- Investing in the stock market is like being your own manager. You are responsible for managing your money directly. However, exceptions like PMS and equity advisory services exist
- Relative to a bus, a car can go faster. However, higher speed means higher risk of accident. Similarly, shares or stocks offer higher potential returns when compared to mutual funds



BUNTS SANGHA'S
S.M. SHETTY COLLEGE OF SCIENCE, COMMERCE AND
MANAGEMENT STUDIES, POWAI.
Permanently Affiliated to University of Mumbai
NAAC ACCREDITED 'A' GRADE
IMC RBNQ CERTIFICATE OF MERIT 2019
ISO 21001:2018 CERTIFIED

THANK YOU LETTER



BUNTS SANGHA'S
S.M.SHETTY COLLEGE OF SCIENCE, COMMERCE &
MANAGEMENT STUDIES

PERMANENTLY AFFILIATED TO UNIVERSITY OF MUMBAI
ACCREDITED BY NAAC - 'A' GRADE
IMC RBNQ - Merit Certificate
ISO 21001 : 2018 Certified

SMS/2381

October 01, 2021

To,
Mr. Ditesh Palan
Alumni BAF Department

Dear Ditesh,

It gives us immense pleasure to have you as '**Resource Person**' on the topic "**Equity Mutual Fund vs Direct Equity**" organised by Department of BAF and BBI of our college on 30th September, 2021.

We appreciate your efforts towards sharing your expertise and knowledge. You took time out of your busy schedule and made yourself available on a very short notice. We on behalf of our college are indeed thankful to you for sparing your precious time.

It was truly an enriching session. Thank you once again.

With Regards,



Dr Sridhara Shetty
Principal PRINCIPAL
Bunts Sangha's S.M. Shetty College
of Science, Commerce & Management Studies
Powai, Mumbai-400 076.
Tel. 022-6132 7352
Email: college@smshettyinstitute.org

BUNTS SANGHA'S
S.M. SHETTY COLLEGE OF SCIENCE, COMMERCE AND
MANAGEMENT STUDIES, POWAI.
Permanently Affiliated to University of Mumbai
NAAC ACCREDITED 'A' GRADE
IMC RBNQ CERTIFICATE OF MERIT 2019
ISO 21001:2018 CERTIFIED
ATTENDANCE LIST OF PARTICIPANTS

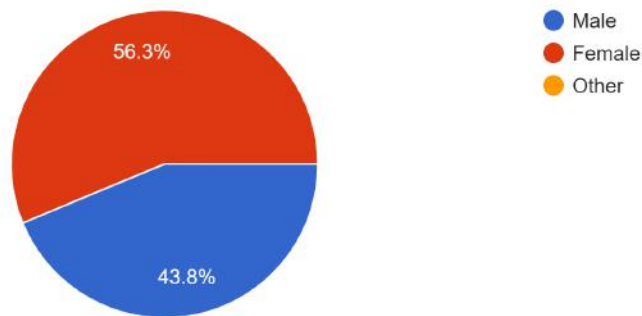
Name of the student	Gender	Class
TEJAS SADANANDA RAI	Male	FYBAF
Praveen Thevar	Male	FYBBI
Shruti Shetty	Female	FYBAF
Natahsha Pujari	Female	FYBBI
Karthik konar	Male	Fybbi
Anshul	Male	FY BAF
Viraj Kotian	Male	FYBAF
Nidhi Patel	Female	Fybbi
Shreyas Amin	Male	FYBAF
Rohan Poojary	Male	FYBAF
Rohan gutam	Male	Ug
Nikita Gupta	Female	FYBBI
Mansi pawar	Female	Fybbi
Kartik raorane	Male	Baf
Tejashree shrikrishna paraskar	Female	FYBAF
Sumanth Acharya	Male	Baf
Hetvi Rampariya	Female	FY BAF
Vijeth .S. Shetty	Male	BBI
Neetu jaiswal	Female	FYBBI
Vaishnavi Salunkhe	Female	Fybbi
Preethi Shetty	Female	FYBBI
Shetty Vikyath Vijay	Male	BAF
Maurya AmitKumar	Male	FYBAF
Komal Manohar Gaikwad	Female	Fybbi
Rakshitha Shetty	Female	FYBBI
Aditya Pandey	Male	F.Y.B.B.I
Qudsiya Parween Shaikh	Female	FYBBI
Shreyas Santosh Raut	Male	FYBAF
Shaikh Nidabanoo HussainI	Female	FYBBI

Harshita Puthran	Female	FYBBI
shaman shetty	Male	FYBBI
Aryan Billawa	Male	fybaf
Saiprasad Amin	Male	FYBBI
Rashmitha Jayaram Poojary	Female	FYBAF
Alan Saji	Male	FYBAF
Mrugaja Chavan	Female	FYBAF
Abhimanyu Sharma	Male	FYBBI
Kavya Acharya	Female	FY BAF
Jash Dhandhukia	Male	FY BAF
Shubham yadav	Male	Fybbi
Aslesha Satam	Female	FYBBI
Prathik	Male	Fybaf
Khushi Arvind Verma	Female	FYBBI
Mrunal Hemant Sakpal	Female	FYBAF
Isha Surya	Female	FYBAF
Mayuri Rohidas Dal.	Female	FYBBI
Sayyed Gulnaaz	Female	Fy b.b.i
SALONI WAYKAR	Female	FY BAF
Tina Agarwal	Female	fybaf
Thriпти Suvarna	Female	FYBAF
Dikshita Mane	Female	FYBBI
Arpita shetty	Female	Fybaf
Vishwa Jadhav	Female	FY BBI
Suraj Rawat	Male	FYBBI
Adithya shetty	Male	FYBAF
Disha Shetty	Female	FYBBI
Nidhi Shetty	Female	FYBAF
Mahek ganatra	Female	Fybaf
Thriпти Suvarna	Female	FYBAF
Harshita Tukrul	Female	FYBAF
Adithya shetty	Male	FYBAF
Atharv Bhabal	Male	Fybaf
Sharanya shetty	Female	FY BAF
Jason Menezes	Male	Alumini

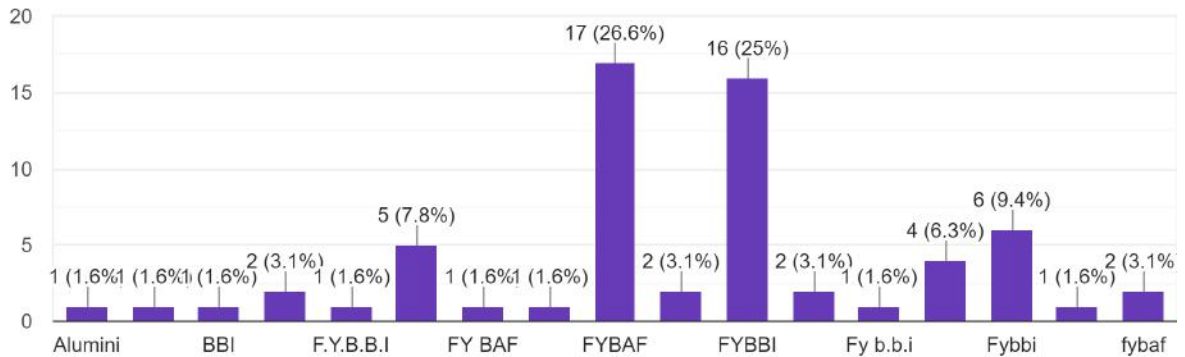
BUNTS SANGHA'S
S.M. SHETTY COLLEGE OF SCIENCE, COMMERCE AND
MANAGEMENT STUDIES, POWAI.
Permanently Affiliated to University of Mumbai
NAAC ACCREDITED 'A' GRADE
IMC RBNQ CERTIFICATE OF MERIT 2019
ISO 21001:2018 CERTIFIED

FEEDBACK ANALYSIS

Gender
64 responses

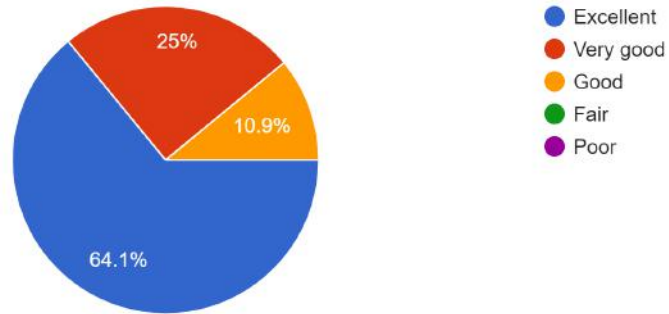


Class
64 responses



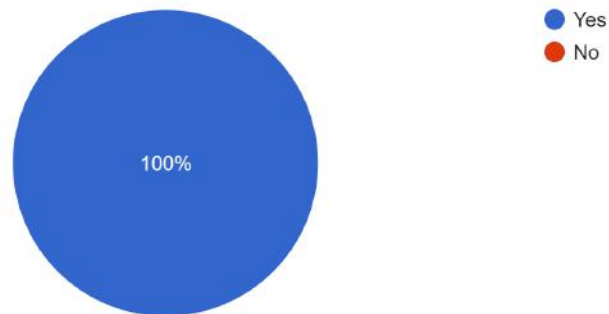
How did you find the content of the Session?

64 responses



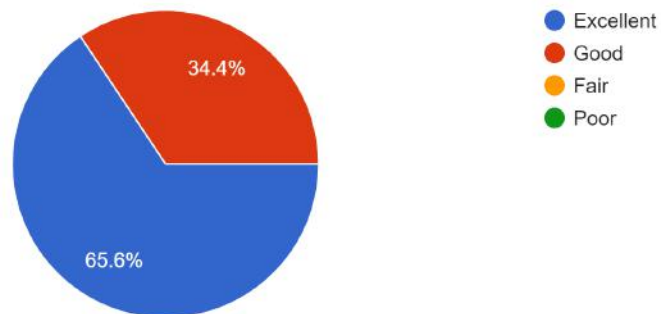
Did the session improve your understanding of the topic?

64 responses



How would you rate your overall learning experience?

64 responses



BUNTS SANGHA'S
S.M. SHETTY COLLEGE OF SCIENCE, COMMERCE AND
MANAGEMENT STUDIES, POWAI.
Permanently Affiliated to University of Mumbai
NAAC ACCREDITED 'A' GRADE
IMC RBNQ CERTIFICATE OF MERIT 2019
ISO 21001:2018 CERTIFIED

ACTION TAKEN REPORT

Action taken by the Department of Commerce (BAF & BBI) for the feedback provided for the Alumni Session on 'Equity mutual funds vs Direct equity.'

Date	Feedback Received	Action Taken
30 th September,2021	<ul style="list-style-type: none">● Participants found the session very relevant and helpful.● Participants appreciated the efforts taken by the Commerce Department of the college to conduct this event.	Department of Commerce will conduct such events in future.