

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

**Student Enrichment Activity Approval Form**

**Department:** B.COM

**Program:** Investor Awareness Programme in association with CDSL & Krisha Foundation

**Objectives:** To acquaint students with various investment avenues and risks associated with them.

**Need:** Students must be informed about the basics of investment and depository services.

**Content:** The resource person is expected to introduce the participants to various risks involved while investing in short-term and long-term markets. They are also expected to talk about investment depository.

**Resource Person:** Mr. Sanjay Nunes (Ass. Manager, CDSL) and Dr. Riya Nathani(Trainer, Krisha Foundation)

**Date:** 30/08/2021

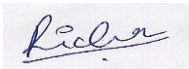
**Time:** 3 pm to 4.30 pm

**Venue:** Zoom App

**Cost/Budget:** N/A

**Proposed by:** B.COM Coordinator

**Verified by:**



Asst. Prof. Richa Sharma  
Convenor of the webinar



Asst. Prof. Sandesha Shetty  
Vice-Principal and Coordinator



Dr Sridhara Shetty  
Principal

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**MINUTES OF THE MEETING**

**Date-** 25/08/2021

**Agenda -** Duty allocation

**Venue -** Zoom App

A meeting was held to allocate duties to the professors for the webinar on Investor Awareness Programme in association with CDSL & Krisha Foundation. Prof. Sandesha Shetty gave the following roles to the respective professors.

**Team Members for the event & work distribution:**

<b>Sr. NO.</b>	<b>Faculty Name</b>	<b>Work Assigned</b>
<b>1</b>	<b>Asst. Prof. Sandesha Shetty</b>	Welcoming & Vote of Thanks
<b>2</b>	<b>Asst. Prof. Utkarsh Kapadia</b>	Report preparation, Certificate designing, and distribution
<b>3</b>	<b>Asst. Prof. Richa Sharma</b>	Arranging documents as per NAAC requirements, Q&A session

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**POSTER**



**Bunts Sangha's  
S.M. Shetty College of Science, Commerce & Management Studies,  
Powai, Mumbai - 400076  
Permanently Affiliated to University of Mumbai  
NAAC Accredited 'A' Grade  
IMC RBNQ Certificate of Merit 2019  
ISO 21001:2018 Certified**



**Department of Accountancy and Financial Management  
in collaboration with CDSL & Krisha Foundation**

**Presents**

***Webinar on 'Investment Awareness Programme'***

**Resource Persons**

**Mr. Sanjay Nunes (Ass. Manager, CDSL) and  
Dr. Riya Nathani (Trainer, Krisha Foundation)**

**Date: 30th August 2021**

**Time: 03 PM to 4.30 PM**

**Venue: Zoom App**

***E- Certificates will be provided***

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**NOTICE / INVITATION**

Warm Greetings!

Department of Accountancy & Financial Management  
in association with  
CDSL & Krisha Foundation \*

Organises

Investor Awareness Programme

Resource Persons-

Mr. Sanjay Nunes (Asst. Manager, CDSL) and Dr. Riya Nathani(Trainer, Krisha Foundation)

Date - 30/08/2021

Time - 3 pm to 4.30 pm

Venue - Zoom App

Kindly register in advance- <https://us06web.zoom.us/meeting/register/tZMoc-GvrjsoGdNG2JqwWcFwxUdVt8XatTuL>

Best Regards,  
Department of Accountancy and Financial Management

For any query please contact-  
[richas@smshettyinstitute.org](mailto:richas@smshettyinstitute.org)

# Department of Accountancy and Financial Management

**Presents**

## **Investor Awareness Programme**

**Date: 30/08/2021**

**Time: 3 pm to 4.30 PM**

### **Program Schedule**

<b>Opening remarks</b>	<b>Prof. Richa Sharma</b> <i>Faculty, Dept. of Accountancy and Financial Management</i>
<b>Introduction of the resource person</b>	<b>Prof. Richa Sharma</b> <i>Faculty, Dept. of Accountancy and Financial Management</i>
<b>Technical Session - 1</b>	<b>Mr. Sanjay Nunes (Asst. Manager, CDSL) and Dr. Riya Nathani (Trainer, Krisha Foundation)</b>
<b>Question &amp; Answer Session</b>	<b>Prof. Richa Sharma</b> <i>Faculty, Department of Accountancy and Financial Management</i>
<b>Vote of Thanks</b>	<b>Prof. Utkarsh Kapadia</b> <i>Faculty, Department of Accountancy and Financial Management</i>

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## **B.COM DEPARTMENT**

### **Report**

**Event:** Investor Awareness Programme

**Resource Person:** Mr. Sanjay Nunes (Asst. Manager, CDSL) and Dr. Riya Nathani (Trainer, Krishna Foundation)

**Date:** 30/08/2021

**Time:** 3pm to 4.30pm

**Venue:** Zoom App

**Scope:** SY and TY BCOM Students

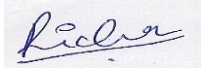
**Objective:** To acquaint students with various investment avenues and risks associated with them.

**Highlights:** Asst Prof. Richa Sharma welcomed Vice-Principal and B.Com Coordinator Asst Prof. Sandesha Shetty, all faculty members and students present in the program. Vice Principal Asst Prof. Sandesha Shetty welcomed Resource person Mr.Sanjay Nunes (Asst Manager, CDSL) and Dr. Riya Nathani (Trainer, Krishna Foundation) and gave them the platform to guide the students on the topic of the webinar. The resource person gave detailed explanations on Investment Schemes, Investment Elements, Share market as well as the Dos and Don'ts of Investment. Asst Prof. Richa Sharma further handled the 'Question & Answer Session' where participants raised their questions and the resource person gave clarity on it. Asst Prof Utkarsh Kapadia proposed a vote of thanks to both the Resource Person Mr. Sanjay Nunes and Dr. Riya Nathani for taking out time and guiding the students on the Investment Avenues, Stock Market as well as Investment Process. Asst Prof Richa Sharma shared the Attendance and Feedback link to the participants and the event was successfully concluded. Participants gave positive feedback where they appreciated the intention behind the event and gained immensely from the same.

**Total Number of participants: 30** (11 Female + 19 Male)

**Members for the event:**

1. Asst. Prof. Sandesha Shetty– Vice-Principal and B.Com Coordinator
2. Asst. Prof. Richa Sharma - Convener of the Event & Class In Charge SYBCOM A
3. Asst. Prof. Utkarsh Kapadia - Class IN Charge TYBCOM B



Asst. Prof. Richa Sharma  
Convener of the Webinar

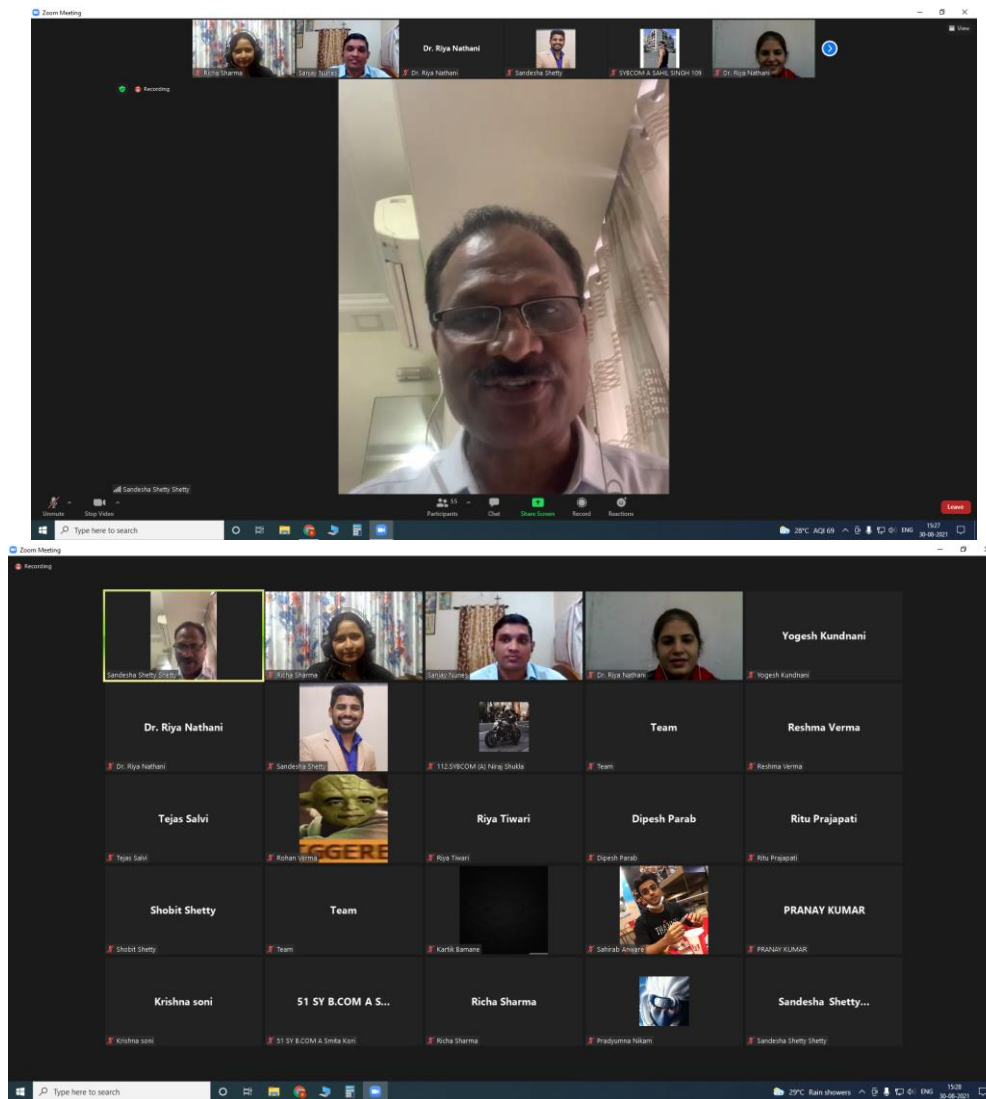


Asst. Prof. Sandesha Shetty  
Vice Principal & Coordinator

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**B.COM DEPARTMENT**

**Photos**





Zoom Meeting | You are viewing Sanjay Names' screen | View Options

Richa Sharma | Dr. Riya Nathani | Sandesha Shetty | Dr. Riya Nathani

## Lessons on Financial Planning & Independence

INVESTOR PROTECTION FUND TRUST

- Need for Saving
- Inflation and Investing
- Financial Planning & Investment Planning
- Asset Allocation
- Introduction to Capital Market
- Rights Issue – Overview
- Do's & Don'ts Before Trades
- Services offered by Depository
- Key Takeaways for Investors

22°C Rain showers | 19:18 30-09-2021

Zoom Meeting | You are viewing Dr. Riya Nathani's screen | View Options

Richa Sharma | Dr. Riya Nathani | Sandesha Shetty | Dr. Riya Nathani

## Financial Planning & Investment Planning

INVESTOR PROTECTION FUND TRUST

<b>Investment Planning</b> (Planning of Money)	<b>Financial Planning</b> (Planning of Income)
Indian Investment Trends Income - Expenses = <b>Savings</b>	Foreign Investment Trends Income - Savings = <b>Expenses</b>

*"Do not save what is left after spending; instead spend what is left after saving"*

- Warren Buffet

22°C AQ2 26 | 19:54 30-09-2021

Zoom Meeting | You are viewing Dr. Riya Nathani's screen | View Options

Richa Sharma | Sanjay Names | Dr. Riya Nathani | Sandesha Shetty | Ajay yadav

File Edit View Window Help | 12 / 29 | 31.7% | Tools Fill & Sign Comment

## What is Mutual Fund?

- A mutual fund is a common pool of money into which investors put their contributions to be invested in accordance with a stated objective.
- Investors get mutual fund units, on a proportionate basis, for the sum contributed to the pool. Fund belongs to all unit holders.
- The funds are managed by professional fund managers.
- In an age where investment no longer is confined to a savings account or a few fixed deposits, mutual funds have come a long way.
- Investors prefer mutual funds as managing them can be way easier than handling stocks or bonds individually.

KRISHA FOUNDATION

CDSL

30°C Rain showers | 19:23 30-09-2021

Zoom Meeting

You are viewing Dr. Riya Nathani's screen

Richa Sharma Sanjay Nunes Dr. Riya Nathani Sandesha Shett... Ajay yadav

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# Classification of Mutual Funds

Based on Structure	Based on Investment Objective	Based on Investment Style
Open ended funds	Debt funds	Passive funds
Close ended funds	Equity funds	Active funds
Interval funds	Hybrid funds	

KRISHA CDSL

Start Video Participants Chat Share Screen Record Reactions

Type here to search

32°C Rain showers 16:29 30-08-2021



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**Certificate Copy**

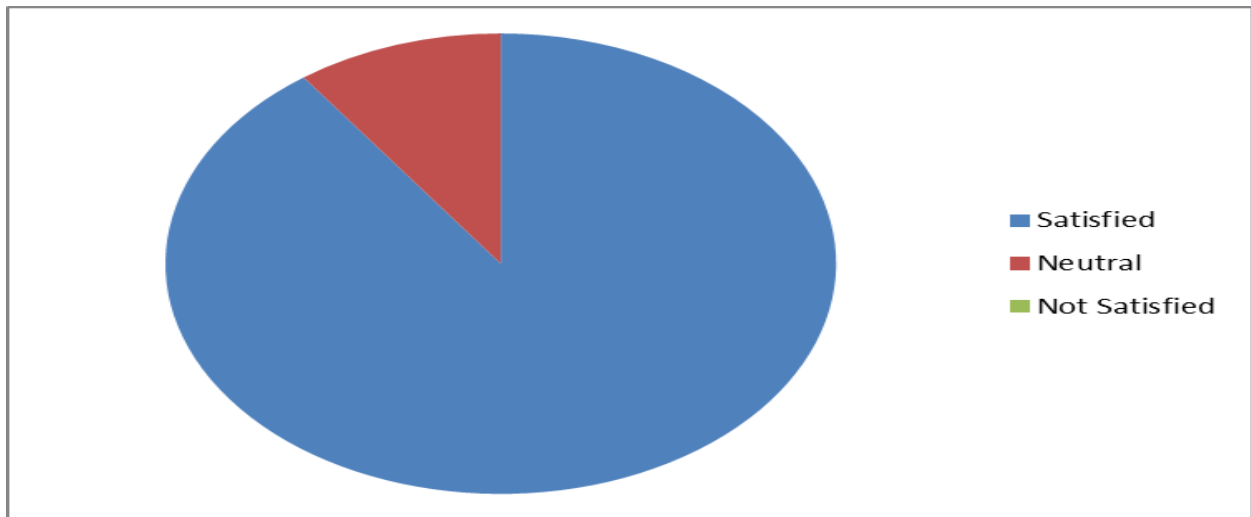


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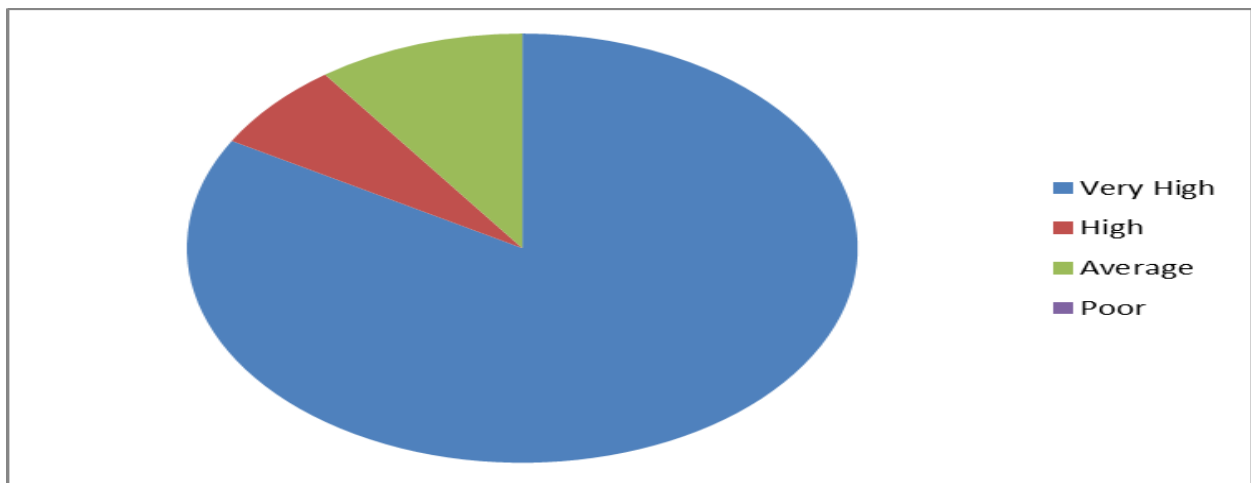
**B.COM DEPARTMENT**

**Feedback**

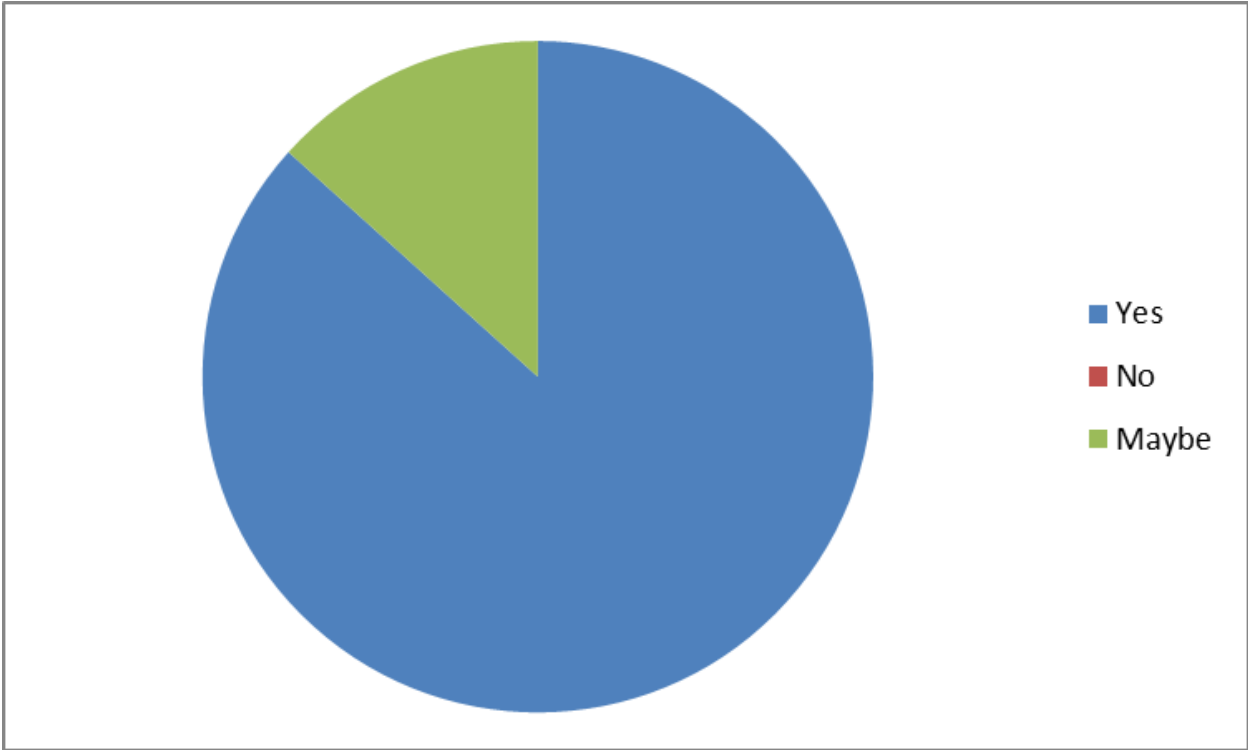
**Q.1. Rate the presentation of the Resource Person.**



**Q.2. Rate the Relevance of Topic of the Webinar**



**Q.3. Do you believe that such events should be organized in future.**



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**B.COM DEPARTMENT**

**Action Taken Report**

Actions taken by B.COM Department for the feedback provided for Webinar on 'Investment Awareness Programme' are as follows:

<b>DATE</b>	<b>Feedback Received</b>	<b>Action Taken</b>
<b>30-08-2021</b>	<ul style="list-style-type: none"><li>● Participants appreciated the efforts taken and gained immensely from the same.</li><li>● A few expressed the desire to intern with Shine Project.</li></ul>	B.COM Department will organize more such programs in order to provide practical insights on Investment Awareness.