

Wealth / Investor Awareness Program

Date: 8th April 2024

Time: 03:00PM to 5:45PM

Venue: ASM-IPS College Auditorium

Introduction: The Wealth/Investor Awareness Program, organized by HSBC Mutual Fund, was aimed at empowering participants with the knowledge and tools needed to make informed financial decisions. With a focus on mutual funds and wealth management, the program highlighted the importance of financial planning, investment strategies, and risk management in achieving financial goals. The event brought together experts to provide valuable insights into the investment landscape.

Objective:

1. To educate participants about the fundamentals of mutual funds and their role in wealth creation.
2. To create awareness about the importance of systematic financial planning and disciplined investing.
3. To explain risk management strategies and portfolio diversification techniques.
4. To encourage participants to make informed investment decisions to secure their financial future.

Report:

The event began with a welcome note by Asst. Prof. Jyoti Gawhane and session started after felicitation of guest by Dr. Vikas Barbate, Dean ASM's IPS.

Senior representative of HSBC Mutual Fund, introduced the agenda and objectives.


1. Session 1: Basics of Mutual Funds
 - The first session covered the fundamental concepts of mutual funds, types of funds (equity, debt, hybrid), and their suitability for different financial goals.

- An interactive discussion helped participants understand the benefits of SIPs (Systematic Investment Plans).
2. Session 2: Financial Planning and Wealth Management
- Experts emphasized the importance of goal-based financial planning and aligning investments with personal objectives.
 - Tools for budgeting, saving, and investing were introduced to attendees.
3. Session 3: Risk and Portfolio Management
- A detailed explanation of risk factors associated with investments and how to mitigate them through portfolio diversification.
 - Real-life examples illustrated how to balance risk and returns effectively.
4. Q&A and Case Studies:
- Participants actively engaged in a Q&A session, seeking clarity on complex investment concepts.
 - Case studies demonstrated successful investment strategies and lessons learned from market experiences.

Session ended with Closing Remarks. The program concluded with a summary of key takeaways and an encouragement to adopt disciplined investment habits. Vote of thanks again given by Asst. Prof. Jyoti Gawhane.

Photos:

Wealth Management.pptx




SEMINAR ON : Wealth Awareness (Financial Wellness Enhancement)

DATE | 8th April 2024

TIME | 12:00 Noon To 01:00 Pm

VENUE | Conference hall



**GPS Map
Camera Lite**

29/1, Old Mumbai - Pune Hwy, Empire Estate Phase 1, MIDC, Chinchwad, Pimpri-Chinchwad, Maharashtra 411033, India

Latitude 18.6323797°	Longitude 73.7991492°
Local 12:07:10 PM GMT 06:37:10 AM	Altitude 567 meters Monday, 08.04.2024



Investor Awareness Program

**GPS Map
Camera Lite**

29/1, Old Mumbai - Pune Hwy, Empire Estate Phase 1, MIDC, Chinchwad, Pimpri-Chinchwad, Maharashtra 411033, India

Latitude 18.63252166°	Longitude 73.79917467°
Local 12:14:07 PM GMT 06:44:07 AM	Altitude 570 meters Monday, 08.04.2024



GPS Map
Camera Lite

Asm Group Of Institute, Asm Group Of Institute, Service Rd, MIDC, Pimpri Colony,
Pimpri-Chinchwad, Maharashtra 411019, India

Latitude
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Longitude
73.7991368°

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GMT 06:56:56 AM

Altitude 567 meters
Monday, 08.04.2024



GPS Map
Camera Lite

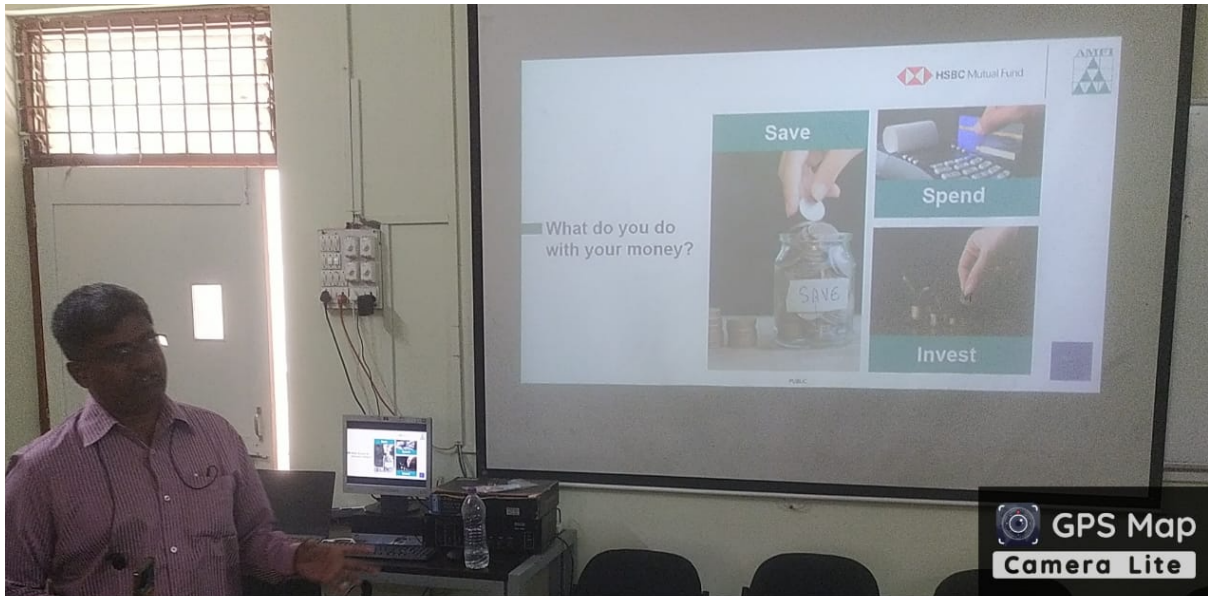
Asm Group Of Institute, Asm Group Of Institute, Service Rd, MIDC, Pimpri Colony,
Pimpri-Chinchwad, Maharashtra 411019, India

Latitude
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Longitude
73.7991325°

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GMT 06:51:06 AM

Altitude 567 meters
Monday, 08.04.2024



29/1, Old Mumbai - Pune Hwy, Empire Estate Phase 1, MIDC, Chinchwad, Pimpri-Chinchwad, Maharashtra 411033, India

Latitude
18.63241511°

Longitude
73.79913094°

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GMT 06:48:32 AM

Altitude 570 meters
Monday, 08.04.2024



29/1, Old Mumbai - Pune Hwy, Empire Estate Phase 1, MIDC, Chinchwad, Pimpri-Chinchwad, Maharashtra 411033, India

Latitude
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Longitude
73.7991317°

Local 12:14:37 PM
GMT 06:44:37 AM

Altitude 570 meters
Monday, 08.04.2024

Outcomes:

➤ **Enhanced Financial Literacy:**

Participants gained a solid understanding of mutual funds, SIPs, and their role in wealth creation.

➤ **Improved Investment Awareness:**

Attendees learned about risk management, portfolio diversification, and long-term investment strategies.

➤ **Actionable Insights:**

The program provided practical tools and resources for participants to start or enhance their investment journeys.

➤ **Increased Confidence:**

Participants felt more confident about making informed financial decisions and pursuing their financial goals.

➤ **Community Impact:**

Many attendees expressed interest in sharing their knowledge with peers and promoting financial literacy in their communities.