

presents
**Corporate Workshop On
Portfolio Construction in Wealth Management**



Event Highlight

Portfolio Construction in Wealth Management aims to assist participants in understanding wealth concepts, markets, financial products, stock portfolios, risk & returns, mutual fund portfolio and in application of wealth management skills. The program will help in gaining relevant knowledge of types of asset classes and types of financial products available for investors to create a portfolio based on suitability, risk and investment returns in a personal finance environment.

Best suited for

This program has been designed for

- Post graduate students, specializing in Finance
- Entrepreneurs who want to understand financial markets and portfolio theory
- Independent financial advisors
- Individuals who want to have a holistic view on identifying different investment avenues and manage their wealth.

Program Content and outcome

This session aims to blend academics and some of the best industry practices related to wealth management. At the end of the session, the participants should be in the position to understand

- Steps involved in managing wealth by customer profiling
- Need and procedure of constructing a portfolio
- Stock portfolio – identifying sectors in capital market and indices
- Mutual fund portfolio – various mutual fund schemes and concepts
- Understanding of investment risk and returns.

The workshop will involve case study, role play and activities. The focus of the program will be on a interactive and dynamic environment where ideas and thought process can flow freely.

About the Speaker

Ms. Dhvani D Shah is the Director of Flip Coin Investments which is into providing financial services and corporate training. She has done Masters in Business Administration in Finance & HR from CMS Business School. She is certified in Capital Market & Technical Analysis with NSE's Certification in Financial Markets (NCFM) and has expertise in financial subjects such as portfolio management, wealth management, Equity market, Derivatives, financial markets and instruments, banking and many more.

She had earlier worked with Sykes and Ray Equities (India) Limited as Equity Analyst and has carried out equity research in various sectors. Dhvani has overall training experience of 500+ students in the field of financial markets across various colleges such as Dayanand Sagar, CMR, GICE and more.

Date & Time : 21st February 2015 & 09:30 AM - 4:30 PM
Venue: Seminar Hall, CMS Business School

Nomination to be sent to

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