

Event Name	Professional Development Programme
Topic:	Investment & Tax Planning
Date:	21,22,25,26,& 27 th March
No. of Days:	5 Days
Start Time: End Time:	5.30 pm to 7.30 pm
Venue Campus Name & Place:	CMS Business School Jain (Deemed to be University) Bangalore
Section/Semester:	Academicians & Industry
Batch:	NA
Mod of Event Online (Provide Virtual Link)	https://zoom.us/j/98400548457? pwd=c2lReE44aWdjVG1ENEhYYlpCZEIydz09 Meeting ID: 984 0054 8457 Passcode: 12345
Name of Speakers	Dr. B Raghavendra Rao, Dr. Shashank M Hiremath and Mr. Shaktendra Mishra
Chief Guest/Dignitaries/Speaker Designation:	Professor Finance, Associate Professor Finance, Co-Founder & Director.
Chief Guest/Dignitaries/Speaker Contact No & Email Id:	br.rao@jainuniversity.ac.in 9844733999 shashanka_m22@cms.ac.in 9845239036
Chief Guest/Dignitaries/Speaker Company/ Institute Name:	CMS Business School Jain (Deemed to be University) Bangalore CMS Business School Jain (Deemed to be University) Bangalore Solanky Investments Private Limited & Solanky Broking LLP https://solanky.in
Event Coordinators Name & Contact No.	Dr Shakeela Banu C 9844506206 Dr Madhavi R 9986593254 Dr Lourden Selvamani
Collaboration & Association (Company Name,	NA
Guest Email Id:	NA
Guest Contact Number:	NA
Moderator (if any)	NA
No. of Participants	76
Professional Photographer Name & Contact No.:	NA
Feedback:	Attached

Brochure/Poster: (if any)	Attached
Budget of the Program (if any):	NA
Revenue Collected: (if any)	39.400 Rs

1. Introduction:

India is all set and poised to become the third largest economy in the world. The Indian capital market is sprinting ahead. India enjoys four Ds, namely, Democracy, Demography, Demand, and Decisiveness. There is a consistent rise in the middle class category due to the surge in per capita income. What was once considered a luxury has now become a necessity. Every Indian has no choice but to participate in India growth story. Therefore, the thesis is ‘Invest in India’. This program provides a strong foundation in financial planning, tax planning and investment analysis, making it ideal for beginners to start their investment journey.

2. Program Objectives:

- Tax Planning and Tax Management
- Passive but Effective Investment
- Technical Analysis
- Investment Strategies
- Techno Funda Analysis

3. Relevance to PO, Relevance to PEO and PSOs

PO	Program Objective (PO)
PO1	Apply knowledge of management theories and practices to address and resolve business challenges
PO2	Demonstrate analytical and critical thinking abilities for information-based decision making
PO3	Analyse global, economic, legal and ethical aspects of business
PO4	Apply trans-disciplinary tools and techniques towards effective problem solving
PO5	Assist others and self in accomplishing organizational objectives and contribute effectively to a collaborative team setting.
PO6	Exhibit an entrepreneurial mind-set for the establishment of sustainable businesses and societies.
PO7	Exemplify value-based leadership for excellence

4. Activity Overview:

Online Professional Development Program (PDP) titled ‘**Investment & Tax Planning**’, was held during **21st, 22nd, 25th, 26th & 27th March 2024**, organised by CMS Business School, Faculty of Management Studies, Jain (Deemed-to-be University).

The program caters to everybody’s needs of investment and tax planning. It covers a broad target audience. People who are yet to start their investment journey, young investors having a little

exposure to the market, investors who are hands-on in investing, working women and home makers, students who are aspiring to begin investment journey, employed, self-employed, entrepreneurs and retired can benefit from this program. Even experienced investors can benefit from our in-depth technical analysis sessions, learning how to harness market trends and indicators to enhance their strategies. Our virtual trading simulations would enable participants to make real investment decisions with confidence. PDP participants would learn from experts and seasoned investors invaluable insights of investments.

5. Guest/Speakers' Profile:



Dr. Rao is Professor of Finance at CMS Business School, JAIN (Deemed-to-be University) and served as Area Chair of Finance from 2011 to 2020. He has 4 years of Corporate and 31 years of Academic experience. He is the Research Guide for PhD Programme of JAIN (Deemed-to-be University). He is a qualified Cost and Management Accountant and Fellow of the Institute of Cost Accountants of India. He is a CFA. He is a Chartered Management Accountant from CIMA, UK and a Chartered Global Management Accountant (AICPA, USA). His areas of research interest are ESG and Sustainability Reporting, Corporate Governance, ETFs, FinTech, Financial Modelling, Derivatives and Risk Management. As a visiting faculty at IIM Indore during 2013 and 2014, he earned a feedback rating of 9.01 on 10. He completed course on 'Decision Making Using Financial Accounting' from IIT Madras with 97% [Elite + Gold Class]. Dr. Rao is an IBM Data Science Professional. Case studies on 'Infosys Segment Reporting', 'Fundamental Analysis of Canara Bank' and 'EVA -Construction and Reporting at Pidilite Industries' authored by Dr. Rao are published with the Case Center, UK His article on MBO in Chartered Accountant Journal was adjudged as the best article. He conducted corporate training for GMR and HP. The blend of corporate, academic, research and professional experiences fostered Rao for a sustainable execution across the value chain of learning.



Dr. Shashank M Hiremath is an Associate Professor at CMS Business School, part of JAIN (Deemed-to-be University), Bengaluru. He received his Ph.D. from Visvesvaraya Technological University in Belagavi, Karnataka, and possesses a wealth of educational qualifications including DISM, MBA, and M.Com (Banking), alongside holding a UGC-NET qualification in management. With over 16 plus years of combined experience in academia and industry, Dr. Shashank has successfully led five research projects. He is well-regarded as a proficient trainer and analyst within the stock market domain. His expertise extends to training professionals associated with both financial and non-financial institutions, covering diverse areas like financial management, risk

and portfolio management, operations management, and financial derivatives. Throughout his career, Dr. Shashank has actively engaged in various professional development programs, management development programs, conferences, summits and workshops. Moreover, he has showcased his organizational skills by spearheading seminars, conferences, and industrial visits. His scholarly contributions have been recognized with several best paper awards at national and international conferences. Beyond academia, Dr. Shashank is a committed permanent Life member of the Indian Red Cross Society in Bengaluru.



Mr. Mishra is a seasoned veteran in the financial markets. With a rich experience exceeding one and a half decade, he has contributed significantly to prestigious financial institutions such as ICICI-Direct, Motilal Oswal to name a few. He, has received several awards for his outstanding achievements, and has been honored by esteemed companies like HDFC AMC, Tata AMC, and Bajaj Finance in the last 7 years. The services offered by his firm encompasses a wide range of financial offerings, including Wealth Management, Financial Planning, Portfolio Restructuring, Estate Planning, Debt Restructuring, Portfolio Management Services, Global Investments, and more. His financial acumen and expertise have made him an indispensable asset to both Solanky Investments Private Limited and Solanky Broking LLP, where he has served as a stalwart for the past seven years. As the co-founder, Mr. Shaktendra Mishra's journey in the financial markets reflects the sentiment that “Some journeys are so beautiful that you never want to reach the destination”.

6. Summary and Key Learnings of the session:

Day:1 Passive Investment: What, Why and for Whom? ETFs, Mutual Funds

Passive investing is an investment strategy to maximize returns by minimizing buying and selling. Index investing is one common passive investing strategy whereby investors purchase a representative benchmark, such as the S&P 500 index, and hold it over a long time. Passive investing can be contrasted with active investing.

Day-2 Tax Planning: Choosing Tax Regimes, E-filing, Practical Aspects of Tax

The budget maintained the existing tax rates for both direct and indirect taxes.

Taxpayers with income up to Rs 7 lakh have no tax liability.

Finance Minister Nirmala Sitharaman also withdraws 'tax dispute' up to Rs 25,000 for the period up to the financial year 2009-10, Rs 10,000 for financial years 2010-11 to 2014-15.

Day-3: Basic and Advanced technical analysis, technical indicators and chart patterns

Most investors who understand that the stock market is not a gambling arena prefer to research the stock before investing in it. Broadly, technical analysis and fundamental analysis are the two methods to analyze a company and its stock. While the former is more suitable for day traders and short-term investors, the latter is for long-term investors seeking value stocks. If you are a day trader or a short-term investor who wants to learn the skills of market analysis, then you have landed on the right page. In this blog, we will cover the A-Z of how to analyze a stock technically. Keep reading!

Day-4: Investment and Trading strategies

An investment strategy is a set of principles that guide investment decisions. There are several different investing plans you can follow depending on your risk tolerance, investing style, long-term financial goals, and access to capital,

Investing strategies are flexible. If you choose one and it doesn't suit your risk tolerance or schedule, you can certainly make changes. However, changing investment strategies come at a cost. Each time you buy or sell securities—especially in the short-term in non-sheltered accounts—may create taxable events. You may also realize your portfolio is riskier than you'd prefer after your investments have dropped in value.

Day 5: Asset allocation, Portfolio management, TechnoFunda analysis with real-world examples

Credit risk exposure analysis plays a vital role in portfolio management by providing insights into the potential risks and vulnerabilities of the portfolio. It helps portfolio managers make informed investment decisions, optimize risk-return trade-offs, and protect the value of their portfolios. By identifying and quantifying credit risk exposure, portfolio managers can take proactive measures to mitigate these risks and enhance the overall performance of their portfolios.

Key Points On the Importance of Credit Risk Exposure Analysis In Portfolio Management:

1. Credit risk exposure analysis helps portfolio managers identify and quantify potential risks associated with the creditworthiness of borrowers or issuers.
2. It enables portfolio managers to make informed investment decisions and optimize risk-return trade-offs.

7. Participant details:

Pundareeka Vittala K.R.	Professor	Faculty Management, CMS B.School, JAIN (Deemed-to-be University)
Minerva Das	Assistant Professor	Jain University
Dr. M Himabindu	Associate Professor	Amjad Ali Khan College of Business Administration
SH Vennela	Student	Chanakya University
Mansi Gupta	Student	CMS Business School, Jain University
Sharan R	Student	CMS B school

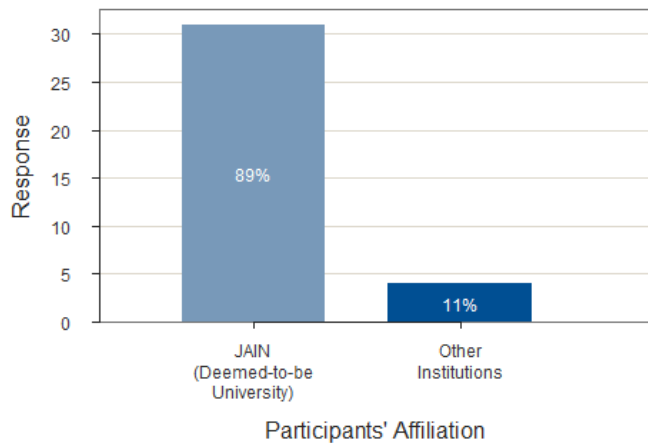
B Surya	Student	CMS Business School - Jain (Deemed-to-be) University
Sriram Rajmohan	Student	Intern School Of Management Excellence
RANJITHA H S	ADMIN EXECUTIVE	CMS BUSINESS SCHOOL
Aditya Kumar Singh	Student	CMS Business School Jain University
Preeti Singha	Student	Cms B school, Jain University
Dr. Ravi Thirumalaisamy	Assistant Professor in Accounting and Finance	Modern College of Business and Science, Muscat, Sultanate of Oman.
Abhinaya U	Student	CMS BUSINESS SCHOOL
PAUL DANIEL VASEEKARAN S	Student	CMS BUSINESS SCHOOL, JAIN (DEEMED-TO-BE UNIVERSITY)
Dr Abhinav Tiwary	Assistant Professor	CMS Business School
K.Lakshmi Gayathri	Student	CMS B School
SULEKAA K	Student	Jain University
Abdul Kareem	Student	Jain
M SUHAAS	Student	CMS BUSINESS SCHOOL
Jayaraj M Ganiger	Student	CMS business School
Saniket patro	Student	Cms BS
SUBRAHMANYA UDUPA V	Student	CMS Business School, Jain University
Ramaskanda V	Student	CMS Business School
Shridevi MP	Student	CMS Business School
Priyanka Singh	MBA Student	CMS Business school
Bharath D R	Student	CMS Business School
Gaurav Sanjay Kundekar	Student	CMS Business School
Shailesh V	Student	JAIN UNIVERSITY
Saanjhree R	Student	CMS B-school, Jain deemed to be university
Dr.M.Nalini	Assistant Professor	Jain (Deemed-to-be) University, CMS - B School
Deepthi Shree N	Student	CMS Business School
Divya Suresh	Student	JAIN (Deemed-to-be University)
Dr. Premalatha K P	Assistant Professor	CMS BS
Brinda S	Student	Pondicherry University
Chaitanya J	Student	CMS B-school Jain University
Sanjana R	Student	CMS business school
Prachi kumari	Student	Shree Damodar college of commerce and economic , Goa
Vidyasagar S L	Student	CMS Business School, JAIN (Deemed-to-be-University)
Deekshita S	Student	Jain university

Prince Agrawal	Student	CMS Business School, Jain deemed to be University
Dr. Kiran Kumar M	Assistant Professor	CMS Business School
Lieutenant Raturaj B Parmar	Judge Advocate General Officer	MoD - WC Hq
Mohammad samal shah	Mba finance	Cmsbs
Shreyas Astagi	Student	CMS Business School (Jain Deemed to be University)
Aanchal Singh	STUDENT	CMS BUSINESS SCHOOL
P Venkata Saikumar	Academic Coordinator	CMS Business School
CHEZHAN KUMAR M S	Senior Academic Executive	MYSORE UNIVERSITY
RAGHAVAN M	MBA student	Jain University
Spandhana Priya C S	Assistant Professor	Mount Carmel College
Tanzim Anan Saikia	Student	CMR University
Vinay Kashyap J	Student	Aims
VISHWANATH KUMBAR	Associate Professor	Sindhi Institute of Management
Narendra Kumar P	Academic Coordinator	CMS Business School
Dr. SHALINI R	Associate Professor	CMS B School, Jain Deemed to be University
Ankith D J	Student	JAIN CMS Business School
Manita D Shah	PROFESSOR	CMS BUSINESS SCHOOL, JAIN (DEEMED-TO-BE UNIVERSITY)
Shakti Swaraj Patnaik	Student	CMS Business School
Yuvraj Basu	Student.	IHM Pusa, Jain University.
Dr.Mansi Kukreja	Professor	Jain Deemed to-be - University, CMS Business School, Bangalore.
KUSHAL JAIN	Finance student	Jain institute
Dr. Sudindra V R	Assistant Professor	Jain CMS Business School
Mohan T S	Programme Coordinator	CMS
Iswarya Subburaj	Student	CMS BUSINESS SCHOOL
SUSHAEN S MAMADAPUR	Student	Jain deemed to be University
Dr V Y John	Associate Professor	CMS Business School
B Naga Bhavika	Finance	CMS Business school
O.R. PAVAN RAGHAVENDRA	Student	CMS Business School
Preeti Singha	Student	CMS B School, Jain University
Jyothi M	Research Scholar	Jain University
Souvik Moitra	Credit Manager	CMS Business School
Dr.Sireesha Nanduri	Associate Professor	JAIN UNIVERSITY
Dr.Sireesha Nanduri	Associate Professor	JAIN UNIVERSITY

Roopa N	Assistant professor	MSRCASC
Kushi gowda GD	Desired	CMS Business School
Rakshitha RN	Desired	JAIN Deemed to be university

- 8. Details of Winners (if applicable): -NA
- 9. Details of the judges (if applicable): -NA
- 10. Attendance records: same as participants list

11. Participants' Feedback, Feedback Analysis, and Attainment Calculation



The frequency distribution analysis of participants' affiliation in the context of "Tax Planning and Investment" reveals a significant representation from JAIN (Deemed-to-be University), with 31 out of 35 participants (88.57%) affiliated with this institution, indicating a strong involvement and interest from this academic community. Additionally, a smaller proportion, comprising 4 participants (11.43%), hails from other institutions, suggesting a diverse participation pool in the discussed topic. Importantly, the absence of missing values in the data underscores its completeness and reliability. Overall, the distribution underscores the significance of JAIN (Deemed-to-be University) in the discourse surrounding tax planning and investment while also acknowledging the broader engagement from varied institutional backgrounds.

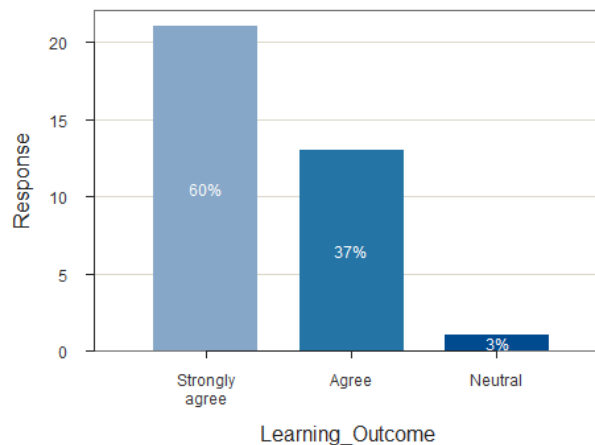


Figure 2: Learning outcomes

The frequency distribution analysis regarding the achievement of learning outcomes suggests a strong consensus among participants, with 60% strongly agreeing that the learning outcomes were met. Additionally, 13 participants (37.14%) expressed agreement, further emphasizing the positive reception of the achieved learning outcomes. Only 1 participant (2.86%) remained neutral in their assessment. Importantly, there are no missing values in the data, indicating a comprehensive response from participants. This distribution underscores a robust acknowledgment of the attainment of learning objectives, with a majority expressing strong agreement, thus affirming the effectiveness of the educational program in delivering desired outcomes

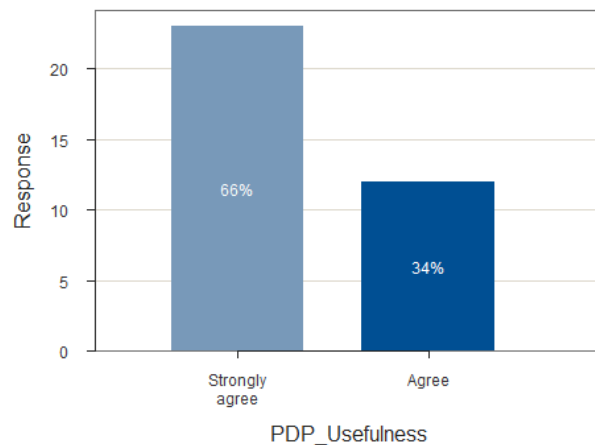


Figure 3: PDP usefulness

The frequency distribution analysis of participants' perceptions regarding the usefulness of the Professional Development Program (PDP) indicates a high level of agreement, with 23 participants (65.71%) strongly agreeing that the PDP was beneficial. Furthermore, an additional 12 participants (34.29%) expressed agreement, supporting the positive assessment of the program's utility. Notably, there are no missing values in the dataset, highlighting a comprehensive response from all participants. This distribution underscores a widespread recognition of the effectiveness and value of the PDP, with the majority strongly affirming its usefulness, thus reflecting positively on the program's design and implementation.

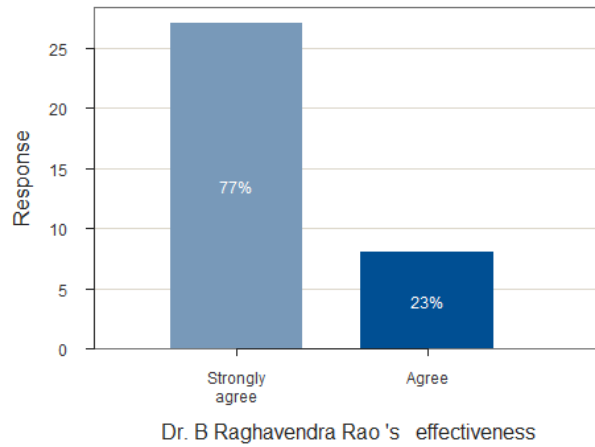


Figure 4: Resource person's effectiveness

The frequency distribution analysis of participants' perceptions regarding the effectiveness of Dr. B Raghavendra Rao indicates overwhelmingly positive feedback, with 27 participants (77.14%) strongly agreeing that he was effective in his role. Additionally, 8 participants (22.86%) expressed agreement, further supporting the positive assessment of Dr. B Raghavendra Rao's effectiveness. This distribution underscores a widespread recognition of Dr. B Raghavendra Rao's effectiveness as a resource person, with the majority strongly affirming his impact, thus reflecting positively on his contributions to the program.

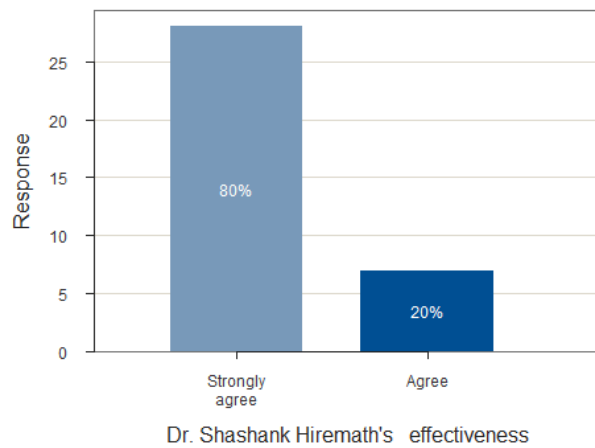


Figure 5: Resource person's effectiveness

The analysis of participants' perceptions regarding the effectiveness of Dr. Shashank Hiremath suggests a highly positive evaluation, with 28 participants (80.00%) strongly agreeing that he was effective in his role. Additionally, 7 participants (20.00%) expressed agreement, further supporting the positive assessment of Dr. Shashank Hiremath's effectiveness. This distribution underscores a widespread acknowledgment of Dr. Shashank Hiremath's effectiveness as a resource person, with the majority strongly affirming his impact, thus reflecting positively on his contributions to the program.

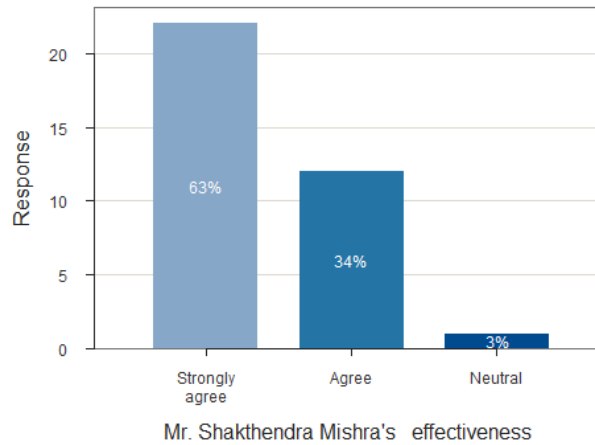


Figure 6: Resource person's effectiveness

The analysis of participants' perceptions regarding the effectiveness of Mr. Shakthendra Mishra reveals a positive evaluation, with 22 participants (62.86%) strongly agreeing that he was effective in his role. Additionally, 12 participants (34.29%) expressed agreement, further supporting the positive assessment of Mr. Shakthendra Mishra's effectiveness. However, one participant (2.86%) remained neutral in their evaluation. This distribution underscores a widespread acknowledgment of Mr. Shakthendra Mishra's effectiveness, with the majority strongly affirming his impact, thus reflecting positively on his contributions to the program.

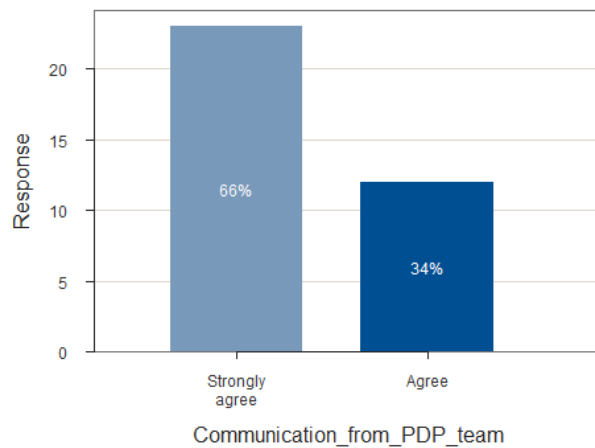


Figure 7: Communication

The frequency distribution analysis regarding communication from the Professional Development Program (PDP) team indicates a positive perception among participants, with 23 participants (65.71%) strongly agreeing that communication from the PDP team was effective. Additionally, 12 participants (34.29%) expressed agreement, further supporting the positive assessment of the team's communication efforts. This distribution underscores a widespread recognition of the effectiveness of communication efforts by the PDP team, with the majority strongly affirming its impact, thus reflecting positively on the team's ability to convey information and engage participants successfully.

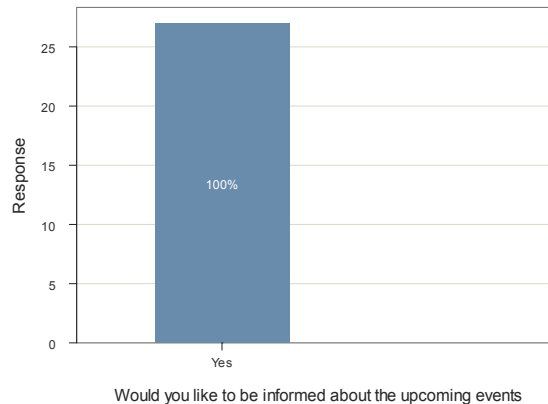


Figure 8: Interested in upcoming events?

The analysis of participants' responses regarding their interest in future events indicates unanimous agreement, with all participants expressing a desire to hear about future events. This overwhelming consensus underscores a strong enthusiasm and engagement among participants, reflecting positively on their interest in continuing their involvement with the program or similar initiatives in the future. This collective interest in future events suggests a high level of satisfaction with the current program and highlights the potential for continued collaboration and participation in upcoming activities

12. Proposals for the Event/Programme:

13.

To,

The Programme Coordinator for kind approval,

Sub: 5 Days PDP

The purpose of PDP is to provide specific inputs on Investment & Tax Planning. The lecture has been planned for two hours. The planned program duration will be during -5.30 pm to 7.30 pm on 21,22,25,26, & 27th of March-2024.

Respected Programme Coordinator your kind approval is requested for the conduct of the same.

The Dean has recommended this proposal.

Kind Regards,

Faculty Coordinator
PDP Committee
Signature

PDP Committee Head
Approval Authority
Signature

14. Minutes of Meetings:

Meeting Title	5 Days PDP	
Date of Meeting	Februaru-11 th	
Meeting Venue	210	
Meeting Agenda	To decide the dates for PDP	
In Attendance	Name	Title/Department/Organization
1	Dr Madhavi R	Professor & programme
2	Dr Shakeela Banu C	coordinator Finance
3	Dr Lourden Selvamani	Associate Professor GM Assistant Professor Finance
Key Meeting Outcomes		
	<ul style="list-style-type: none"> • It was decided that Dr Raghavendra, Dr Shashank Hiremath & Mr. Mishra will be the Resource persons. • 21,22,25,26,& 27th of March are the dates decided 	
Action Plans, if any (along with the First Person Responsible)		
	<ul style="list-style-type: none"> • Dr Madhavi will coordinate in preparing the broacher • .Rumani will send mails for registration • Dr Shakeela Banu C will prepare report for IQAC • Dr Lourden Selvamani will prepare feedback analysis 	

15. Budget: - NA

16.Trailing Emails/communications:



Dr Shakeelabanu <dr.shakeelabanu@cms.ac.in>

Welcome to the PDP | Investment & Tax Planning

1 message

Dr. Madhavi R <dr.madhavi@cms.ac.in>

Thu, Mar 21, 2024 at 3:07 PM

To: Pundareeka Vitala <vitalramu@gmail.com>, Minerva Das <minerva_das@cms.ac.in>, Himabindu M <mail2himareddy@gmail.com>, vennelahaarish28@gmail.com, MANSI GUPTA <Mansi_gupta23@cms.ac.in>, SHARAN R <sharan_r23@cms.ac.in>, SURYA B <Surya_b23@cms.ac.in>, sriramr.isme2124@gmail.com, Ranjitha H S <ranjitha_hs@cms.ac.in>, aditya singh <asaditya109@gmail.com>, PREETI SINGHA <preeti_singha23@cms.ac.in>, ravithirumal@gmail.com, Abhinaya U <abhinaya_u22@cms.ac.in>, PAUL DANIEL <paul_daniel23@cms.ac.in>, "Dr. Abhinav Tiwary" <dr.abhinav_tiwary@cms.ac.in>, KORRAPOLU LAKSHMI GAYATHRI <korrapolu_lakshmiGayathri23@cms.ac.in>, SULEKAA K <sulekaa_k23@cms.ac.in>, ABDUL KAREEM <abdul_kareem23@cms.ac.in>, M SUHAAS <suhaasmanjunath@gmail.com>, Jayaraj Ganiger <jayarajganiger1@gmail.com>, SANIKET PATRO <Saniket_patro23@cms.ac.in>, subrahmanaya_udupa23@cms.ac.in, RAMASKANDA V <ramaskanda_v23@cms.ac.in>, PRIYANKA SINGH <priyanka_s23@cms.ac.in>, BHARATH DR <bharath_dr23@cms.ac.in>, KUNDEKAR GAURAV <kundekar_gaurav23@cms.ac.in>, SHAILESH V <shaillesh_v23@cms.ac.in>, SAANJHREE R <saanjhree_r23@cms.ac.in>, "Dr. M Nalini Sunil" <dr.nalini_m@cms.ac.in>, DEEPTHI SHREE <deepthi_shree23@cms.ac.in>, divyasuresh1402@gmail.com, "Dr. Premalatha K P" <dr.premalatha_kp@cms.ac.in>, brindas2002@gmail.com, CHAITANYA J <chaitanya.j.ram@gmail.com>, sanjana_r23@gmail.com, PRACHI KUMARI <prachi_kumari23@cms.ac.in>, SHRIDEVI MP <shridevi_mp23@cms.ac.in>, Vidyasagar S L <Vidyasagar_s22@cms.ac.in>, DEEKSHITA S <deekshita_s23@cms.ac.in>, PRINCE AGRAWAL <Prince_agrawal23@cms.ac.in>, Kiran Kumar <kiran_kumar.m@cms.ac.in>, RUTURAJ PARMAR <ruturajbparmar@gmail.com>, Mohammad Samal Shah <mohammad_samal22@cms.ac.in>, SHREYAS CMS <shreyas_cms23@cms.ac.in>, AANCHAL SINGH <aanchal_singh23@cms.ac.in>, Pulagampalli Venkata Saikumar <saikumar_pv@cms.ac.in>, Chethan Kumar M S <chethankumar_ms@cms.ac.in>, RAGHAVAN M <raghavan_m23@cms.ac.in>, spandanapriya@mccbirl.edu.in, TANZIM ANANSAIKIA <tanzim_anansaikia23@cms.ac.in>, Vinay Kashyap <vinaykashyap88892@gmail.com>, Vishal Kumbar <vishalan2@gmail.com>, Narendra Kumar P <narendra_kumar@cms.ac.in>, Dr Shalini R <dr.shalini@cms.ac.in>, ANKITH DJ <ankith_dj23@cms.ac.in>, dr.manita_shah@gmail.com, SHAKTI SWARAJ <shakti_swaraj23@cms.ac.in>, yuvrajbasu@outlook.com, "Dr. Mansi Kukreja" <dr.mansi_kukreja@cms.ac.in>, Kushal Jain <Kushal_jain23@cms.ac.in>, "Dr.Sudindra V R" <dr.sudindra_vr@cms.ac.in>, Mohan T S <mohan_ts@cms.ac.in>
Cc: "Dr. Batani Raghavendra Rao" <br.rao@jainuniversity.ac.in>, "Dr. Chaya Bagrecha" <dr.chayabagrecha@cms.ac.in>, Shashank Hiremath <dr.shashank_hiremath@cms.ac.in>, Dr V Lourden Selvamani <dr.lourden_selvamani@cms.ac.in>, Dr Shakeelabanu <dr.shakeelabanu@cms.ac.in>, "solankyinvestments@gmail.com" <solankyinvestments@gmail.com>, Harsha S <harsha@cms.ac.in>, Harold Patrick <harold.patrick@jainuniversity.ac.in>, "Dr.Dinesh Nilkant" <dineshnilkant@cms.ac.in>

Dear Sir/Ma'am,

Greetings from CMS Business School, Jain (Deemed-to-be University)!

Welcome to the online Professional Development Program (PDP) titled 'Investment & Tax Planning', to be held on **21st, 22nd, 25th, 26th & 27th March 2024**, organised by CMS Business School, Faculty of Management Studies, Jain (Deemed-to-be University).

We believe that all of you are looking forward to the PDP and have already kept yourselves free of other commitments for all five days. Complete participation in all five sessions is important for clear learning of the concepts and receiving the PDP certificate.

Please note:

1. Kindly log in 10 minutes early on all the days. The timings are 5: 30 PM - 7: 30 PM (IST).
2. The Zoom login info is:

<https://zoom.us/j/98400548457?pwd=c2lReE44aWdjVG1ENEhYYlpCZElzd09>

Meeting ID: 984 0054 8457

Passcode: 12345

4/5/24, 3:14 PM

Jain University - Center For Management Studies Mail - Thank you from the PDP Team | Investment & Tax Planning



Dr Shakeelabanu <dr.shakeelabanu@cms.ac.in>

Thank you from the PDP Team | Investment & Tax Planning

2 messages

Dr. Madhavi R <dr.madhavi@cms.ac.in>

Thu, Mar 28, 2024 at 1:35 PM

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Dear participants,

We thank you for your active participation in the recently concluded five-days' **Virtual Professional Development Program (PDP)** titled 'Investment and Tax Planning' held from 21st - 27th March 2024 by CMS Business School, Faculty of Management Studies, JAIN (Deemed-to-be University).

The PDP team places its gratitude towards the 'Resource Persons' for their valuable sessions. They have shared the study material daily already.

As spoken, PF below:

1. The Zoom recordings for all days:

Day1: Mar 21, 2024

<https://zoom.us/rec/share/EWnznfC7ikzjpDnSbemkMao2P9UJilB-TGkbeSMWgDyxtLkn1HGfdimvMN7Dk4F.FTOK8loSZcU5LsSD?startTime=1711021097000>

17. Brochure/Poster: (JPEG format only) –Sent in mail separately along with Report

JGI JAIN | CMS
DEEMED-TO-BE UNIVERSITY | BUSINESS
SCHOOL

pdp
Professional Development Programme

Five Days' Virtual
Professional Development Program
on

Investment & Tax Planning

21, 22, 25, 26 & 27 March '24 | 05:30 PM - 07:30 PM (IST)

bschool.cms.ac.in

18. Pictures for the Event: (On-Line)

Day-1

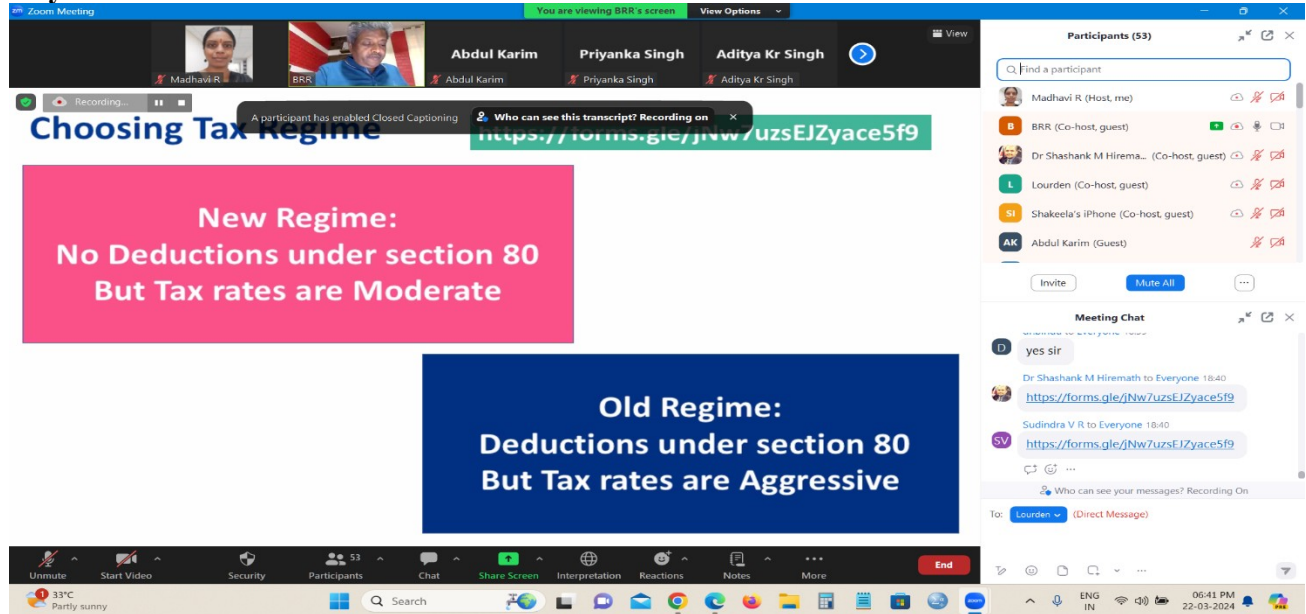


Figure 1: Inauguration of the 5 day FDP on 21st March 2024. Resource persons was **Dr. B Raghavendra Rao**, the topic for the PDP was “Investment & Tax Planning”

Day-2

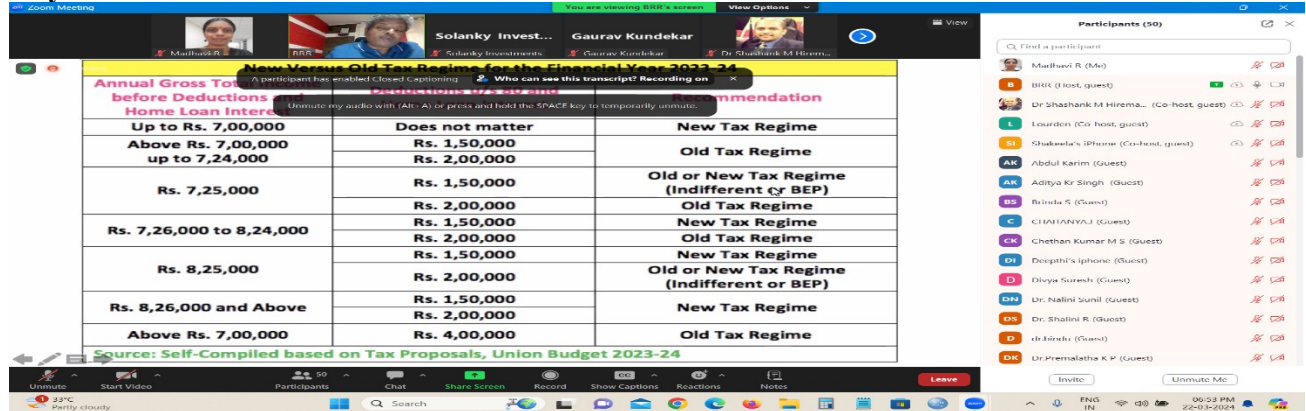


Figure 2: For Day -2 **Dr. B Raghavendra Rao** was the resource person, his session was on **Tax Planning: Choosing Tax Regimes, E-filing, Practical Aspects of Tax**

Day-3

Day 3
Basic and Advanced Technical Analysis, Technical indicators and Chart patterns
 Dr Shashank M Hiremath, Faculty of Management Studies,
 JAIN (Deemed-to-be University), CMS Business School, Bengaluru-24. Ph: +919845239036

Figure 3: Day -3 Dr Shashank Hiremath was the resource person for the 5 days PDP conducted online, the session was on **Basic and Advanced technical analysis, technical indicators and chart patterns**

SHOOTING STAR CANDLESTICK

High High
 Long Upper Shadow
 Small Body
 Close Open
 Low Low
 Small or No Upper Shadow

Figure 4: Day-3 Dr Shashank Hiremath explained the participants regarding shooting star candlestick.

Day-4

Day 4
Chart patterns,
Investment & Trading Strategies
Continued from
Dr Shashank M Hiremath, Faculty of Management Studies,
JAIN (Deemed-to-be University), CMS Business School, Bengaluru-24. Ph: +919845239036

Figure 5: Day 4 , Dr Shashank Hiremath was the resource person, The session was conducted on the topic" Investment and Trading strategies"

Cash V/s Futures V/s Options

Stocks	Qty./ Lot	Rate	Req. Margin	Benefits
SBI	1500	750	1125000	<ul style="list-style-type: none"> Market movement profit loss Corporate Action benefit Voting rights Sole owner of stock you can hold as long as you want High probability of making money as value gets created
Futures	1500	750	225000+m2m	<ul style="list-style-type: none"> Market movement profit loss Leveraging the money Zero sum game only 5% are making money at others cost No ownership Can not hold beyond the expiry
Options	1500	750	15000	<ul style="list-style-type: none"> Market movement profit loss Leveraging the money Zero sum game only 5% are making money at others cost No obligation to exercise the contract

Figure 6: Day 5 , Mr. Mishra was the resource person, The session was conducted on the topic" Asset allocation, Portfolio management, TechnoFunda analysis with real-world examples"