

Report on FIG Activity

Date	13 th February 2024
Time:	08:40 AM - 10:40 AM
Venue:	Lecture Hall - 405, CMS Business School, Sheshadri Road, Gandhi Nagar, Bengaluru – 560009.
Section:	CF5
Batch:	2023-25
Semester:	2 nd Semester
Guest/Speaker Name:	Dr. Balaji Rao D G
Guest/Speaker Designation	Speaker Author Columnist Trainer
Guest/Speaker Contact No & Email Id:	E-mail: enquiry@osatknowledge.com Mobile No: 98450 44155
Guest/Speaker Company/ Institute Name:	Co-founder & Director at Osat Knowledge Pvt. Ltd.
Faculty Coordinators Name:	Dr. Manita D Shah Dr. Rashmi Akshay Yadav
Topic:	Crafting Wealth Strategies: Demystifying Mutual Funds
Moderator (if any)	NA
No. of Attendees	44
Feedback:	Yes
Brochure: (if any)	Yes
Budget of the Program (if any):	NA
Revenue Collected: (if any)	NA

1. Introduction:

"Crafting Wealth Strategies: Demystifying Mutual Funds" serves as a friendly resource to help students navigate the world of personal finance, with a particular focus on understanding mutual funds. Going beyond the basics, this material unlocks different ways to handle money through mutual funds, making investing less confusing. It caters to both beginners and those with some financial knowledge, helping students create smart plans for their unique financial goals. By

demystifying mutual funds, it empowers students to confidently manage their investments, fostering financial adaptability in an ever-changing landscape.

2. Venue (Outside/Inside the campus): Lecture Hall-405, CMS Business School, Sheshadri Road, Gandhi Nagar, Bengaluru – 560009.

3. Program Objectives:

- Strategize wealth-building through effective planning.
- Diversify skills with mutual fund insights.
- Navigate trends for informed investments.

4. 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 mindset for the establishment of sustainable businesses and societies.
PO7	Exemplify value-based leadership for excellence

5. Activity Overview:

In this session, students will delve into the realm of personal finance with a specific focus on understanding mutual funds through "Crafting Wealth Strategies: Demystifying Mutual Funds." The activity goes beyond the fundamentals, unraveling various approaches to managing money through mutual funds to simplify the complexities of investing. Designed for both beginners and those with some financial knowledge, the session guides students in crafting intelligent plans tailored to their individual financial goals. By demystifying mutual funds, participants will gain the confidence and skills needed to navigate their investments adeptly, fostering financial adaptability in an ever-evolving landscape.

6. Guest/Speakers' Profile:

Dr. Balaji Rao DG is a seasoned professional with a diverse academic background, holding qualifications in B.Com, MBA, PGDMM, PGDFA, and a PhD in management focused on mutual funds and personal finance. With 36 years of overall experience, including 20 years in the banking and financial services industry and 11 years in academics, he brings a wealth of expertise. Dr. Rao is a prominent Speaker, Author, Columnist, and Trainer, currently serving as the Co-founder & Director at Osat Knowledge Pvt. Ltd. He has authored 10 books on financial markets and personal finance, delivered over 600 sessions for financial literacy, and conducted training sessions for mutual fund distributors. As a SEBI/NISM empaneled Resource Person, he imparts his knowledge on financial awareness in various media outlets and serves as a visiting professor for leading MBA institutions, emphasizing his significant contributions to the finance and education sectors.



**Balaji Rao Brief
Profile 1.pdf**

7. Summary and Key Learnings of the session:

After attending the session on "Crafting Wealth Strategies: Demystifying Mutual Funds," students will have acquired a comprehensive understanding of personal finance, particularly in the context of mutual funds. The session, which goes beyond the basics, empowers students to navigate the complexities of investing, offering insights into different strategies for managing money through mutual funds. By demystifying mutual funds, students leave the session equipped with the confidence and skills necessary to manage their investments effectively, fostering adaptability in the ever-changing landscape of personal finance.

8. Participant details:

CF5 – 2nd Semester MBA Students

9. Details of Winners (if applicable): - NA

10. Details of the judges – NA

11. Attendance records:

MBA Batch 2022-24

2nd Semester - Corporate Finance

FIG activity Resource

person: Dr. Balaji Rao D G Seminar hall 3 (11.10-1.10)

Topic : Expert Speak Session - "Crafting Wealth Strategies: Demystifying Mutual Funds"

Sl. No.	USN	Student Name	Section	Attendance
1	23MBAR0932	A P LATHIKA SAI	CF5	
2	23MBAR0774	AASHI PITLIYA	CF5	
3	23MBAR0658	ABDUL IZAKH	CF5	
4	23MBAR0968	ABHINAV RAMESH	CF5	
5	23MBAR0706	ABHISHEK B P	CF5	
6	23MBAR0338	AMAL KRISHNA P V	CF5	
7	23MBAR0458	ANIKET KUMAR	CF5	
8	23MBAR0430	ASHUTOSH KUMAR	CF5	
9	23MBAR0306	ASWIN PALANI S	CF5	
10	23MBAR0208	ASWIN V	CF5	
11	23MBAR0582	AYUSHMAN	CF5	
12	23MBAR0378	BANTU PRAKRITHI	CF5	
13	23MBAR0432	CHANDAN REDDY B	CF5	
14	23MBAR0708	CHINMAY H S	CF5	
15	23MBAR0379	CHIRAG SURANA	CF5	
16	23MBAR0434	CHIRANTHA SATISH HEGDE	CF5	
17	23MBAR0352	DARBE AMAN RAMMOHAN	CF5	
18	23MBAR0355	DHARSHINI E	CF5	
19	23MBAR0961	DINESH L	CF5	
20	23MBAR0526	DIXITA SINHA	CF5	
21	23MBAR0906	DSOUZA JANICE JOCELY	CF5	
22	23MBAR0308	FIZA QURAIISHI	CF5	
23	23MBAR0269	G SANTWONA	CF5	
24	23MBAR0483	GARETH KEITH DKHAR SAWIAN	CF5	
25	23MBAR0381	GAUTHAM SHIVADAS	CF5	
26	23MBAR0560	GAYATHRI V	CF5	
27	23MBAR0438	GOUTHAM L	CF5	
28	23MBAR0924	GURIJALA MALLIKARJUNA	CF5	
29	23MBAR0274	HARI SHANMUGARAM B	CF5	
30	23MBAR0339	HARSHAVARDHINI G	CF5	
31	23MBAR0671	HARSHIT NANGAWAT	CF5	
32	23MBAR0529	HARSHITA TALUKDAR	CF5	
33	23MBAR0677	KIRAN P	CF5	
34	23MBAR0348	KOUSHIK KUMAR R	CF5	
35	23MBAR0359	LYDIA MARY	CF5	
36	23MBAR0441	M M MONISH	CF5	
37	23MBAR0444	MOHAMMED SAQIB ILYAS	CF5	
38	23MBAR0445	MONIGA DEVI	CF5	
39	23MBAR0501	MUSKAN PUGALIYA	CF5	
40	23MBAR0291	NABANITA MODAK	CF5	
41	23MBAR0695	PRIYANKA KUMARI	CF5	
42	23MBAR0322	R AISHWARYA SHAKTHI	CF5	
43	23MBAR0889	R RISHITHA	CF5	



MBA Batch 2022-24



2nd Semester - Corporate Finance

FIG activity Resource

person: Dr. Balaji Rao D G Seminar hall 3 (11.10-1.10)

Topic : Expert Speak Session – "Crafting Wealth Strategies: Demystifying Mutual Funds"

44	23MBAR0910	RAGHUL KRISHNA R	CF5	
45	23MBAR0946	RAKSHITH SIMHA	CF5	<i>[Signature]</i>
46	23MBAR0449	ROHITH Koushik D C	CF5	
47	23MBAR0697	ROMITA RAY	CF5	<i>Romita Ray</i>
48	23MBAR0565	RUTVIK S PATIL	CF5	<i>[Signature]</i>
49	23MBAR0964	SAI NIRANJANA R M	CF5	
50	23MBAR0412	SANGEETH MADHUSOODHANAN	CF5	
51	23MBAR0949	SHAKTHIKA S S	CF5	<i>[Signature]</i>
52	23MBAR0928	SHRIYA RAVI	CF5	<i>[Signature]</i>
53	23MBAR0415	SMRITHI R	CF5	<i>Smrithi R</i>
54	23MBAR0551	SRIRAKSHA BAJAR	CF5	<i>Raksha</i>
55	23MBAR0426	SUHAS S	CF5	<i>[Signature]</i>
56	23MBAR0510	SUSANTH S S	CF5	<i>[Signature]</i>
57	23MBAR0058	SWETHAA T P	CF5	<i>[Signature]</i>
58	23MBAR0346	UTTARJYOTI SARKAR	CF5	<i>Uttarjyoti Sarkar</i>
59	23MBAR0422	VISHNUSKANDA M	CF5	<i>[Signature]</i>
60	23MBAR0423	VISWA BHARATH G V	CF5	<i>Viswa</i>

12. Participants' Feedback, Feedback Analysis, and Attainment Calculation:

	Wt Score	5	4	3	2	1						
Questions to Map Pos	List of Pos & PSOs	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Wt. Score				Max score	%age
The program/activity was relevant to my area of specialisation	PO1 PSO1	21	13	1	0	4	164				195	84%
The program/activity enabled me to understand application of concept(s)	PO2 PO4 PO6 PSO2	27	4	4	4	0	171				195	88%
The program/activity provided an opportunity to apply my skill set	PO3 PSO3	22	12	1	2	2	167				195	86%
The program/activity provided a platform to interact with peers and professionals	PO6 PSO1	24	9	2	3	1	169				195	87%
The learning from the program/activity was useful from my career perspective	PO2 PO3 PO4 PSO2	22	12	1	2	2	167				195	86%
The program/activity was well planned and executed	PO1 PO2 PO3 PSO2	26	7	2	3	1	171				195	88%

POs	Q1	Q2	Q3	Q4	Q5	Q6					Q7	Q8	Captured By	Total Attainment Score	Level Achieved
PO1	84%					88%							Q1 Q6	86%	3
PO2		88%			86%	88%							Q2 Q5 Q6	87%	3
PO3			86%		86%	88%							Q3 Q5 Q6	86%	3
PO4		88%			86%								Q2 Q5	87%	3
PO5															
PO6		88%		87%									Q2 Q4	87%	3
PO7															
PSO1	84%			87%									Q1 Q4	85%	3
PSO2		88%			86%	88%							Q2 Q5 Q6	87%	3
PSO3			86%										Q3	86%	3

13. Proposals for the Event/Programme:

To,

The Programme Coordinator for kind approval,

Sub: FIG: Crafting Wealth Strategies: Demystifying Mutual Funds

The purpose of the FIG is to provide specific inputs and exposure from a practical perspective on selected concepts to students. The event has been planned for two hours. The planned program duration will be during 08:40 AM to 10:40 AM on 13th February 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
Finance Area
Signature

Program Coordinator
Approval Authority
Signature

14. Minutes of Meetings:

Meeting Title	FIG - Crafting Wealth Strategies: Demystifying Mutual Funds	
Date of Meeting	06/02/2024	
Meeting Venue	Seminar Hall-02	
Meeting Agenda	Confirming Resource Person	
In Attendance	Name	Title/Department/Organization
1	Dr. Manita D Shah	Professor/Finance Area
2	Dr. Rashmi Akshay Yadav	Assistant Professor/Finance Area
Key Meeting Outcomes		
	<ul style="list-style-type: none"> Finalization of event date and name. Key areas of focus. 	
Action Plans, if any (along with the First Person Responsible)		
	<ul style="list-style-type: none"> Dr. Manita D Shah & Dr. Rashmi Akshay Yadav – faculty coordinator agreed to do the needful. 	

15. Budget: -NA

16. Trailing Emails/communications:

2/23/24, 2:39 PM

Jain University - Center For Management Studies Mail - Re: Campus Connect - Expert Speak Session



Dr. Manita D Shah <dr.manita_shah@cms.ac.in>

Re: Campus Connect - Expert Speak Session

1 message

Dr. Chaya Bagrecha <dr.chayabagrecha@cms.ac.in> Thu, Feb 8, 2024 at 2:48 PM
To: "Dr. Manita D Shah" <dr.manita_shah@cms.ac.in>
Cc: "Dr. Vinoth" <dr.vinoth@cms.ac.in>, Dr Madhavi <dr.madhavi@cms.ac.in>, "Dr. Mansi Kukreja" <dr.mansi_kukreja@cms.ac.in>, "Dr. Shaji Thomas" <shaji.t@cms.ac.in>, Rashmi A Yadav <rashmiakshay_yadav@cms.ac.in>

Sure mam

On Thu, Feb 8, 2024 at 2:45 PM Dr. Manita D Shah <dr.manita_shah@cms.ac.in> wrote:

Dear Ma'am

Myself and Dr. Mansi Kukreja intend to take this program as a FIG activity in our respective sessions on 13th Feb, 2024, as we are attending the OBE Program on 12th & 13th of Feb, 2024. A skill enhancement activity will also be included as a part of the session.

Timings: 1st session - 8:40am to 10:40am (To be managed by Dr. Rashmi)

2nd Session - 11:10am to 1:10pm (To be managed by Dr. Shaji Thomas)

This program will be free of cost. I will request Ms. Jyothi to be available only to take pictures of the event and manage the attendance.

Please let me know if this is fine.

Thank you
Warm Regards
Manita

----- Forwarded message -----

From: **Dr Balaji Rao** <balajirao@osatknowledge.com>
Date: Tue, Jan 16, 2024 at 7:38 PM
Subject: Campus Connect - Expert Speak Session
To: dr.manita_shah@cms.ac.in <dr.manita_shah@cms.ac.in>

Dear Madam,

This email is in connection with conducting a Financial Awareness Session for the students of your institution.

HDFC Asset Management Co. has authorized our company M/s OSAT Knowledge Pvt. Ltd. to conduct a Mutual Fund Expert Speak session for PG students across educational institutions to promote financial awareness at a young age. This session is aimed at enhancing the industry-relevant knowledge of the students before the placement season kicks off at your institution. The students will also get an opportunity to interact with financial services industry veterans about their future career-related queries.

The duration of the session is 90 mins and the same is conducted free of cost.

A similar session is proposed to be conducted for the teaching and non-teaching staff of your institution as well which can be conducted separately. The session helps your earning staff to be informed investors.

Both the sessions, for the students and the staff, will be conducted by Dr. Balaji Rao DG, a financial services industry veteran, whose profile is enclosed for reference. Also enclosed is the profile of Osat Knowledge.

Details of the session:

- Overview of Investments and Financial Services
- Overview of Mutual Funds

2/23/24, 2:39 PM

Jain University - Center For Management Studies Mail - Re: Campus Connect - Expert Speak Session

· Introduction of HDFC Asset Management Company

We will need the support of a projector with HDMI cable and a classroom set up to conduct the session.

We will be taking a few pictures of the event and attendance of the participants which needs to be submitted for proof of having conducted the session.

We look forward to hearing from you on scheduling the session.

Warm Regards,

Dr. Balaji Rao DG
Director & Co-founder
98450 44155

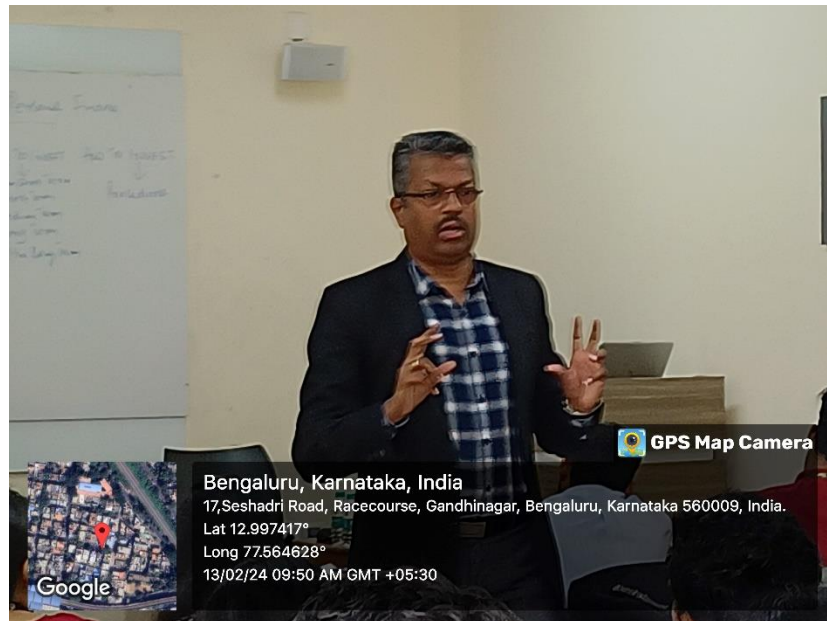
--
Dr. Chaya Bagrecha
Professor,
CMS Business School
Sheshadri Road
Bangalore
9844733999



FIG_Mail.pdf

17. Any other related details: - NA

18. Pictures for the Event:



**Fig 1: Event: Crafting Wealth Strategies: Demystifying Mutual Funds;
Date:13/02/2024; CMS Business School, Sheshadri Road, Gandhi Nagar, Bengaluru –
560009.**



Fig 2: Event: Crafting Wealth Strategies: Demystifying Mutual Funds; Date:13/02/2024; CMS Business School, Sheshadri Road, Gandhi Nagar, Bengaluru – 560009.



Fig 3: Event: Crafting Wealth Strategies: Demystifying Mutual Funds; Date:13/02/2024; CMS Business School, Sheshadri Road, Gandhi Nagar, Bengaluru – 560009.

19. Brochure:

Crafting Wealth Strategies: Demystifying Mutual Funds



Date: 13th February 2024 | **Time:** 08:40 AM - 11:10 AM | **Lecture Hall:** 405

Cohort Profile:

MBA Batch 2023-25, Students of 2nd Semester
Section: CF5

Resource person:

Dr. Balaji Rao D G
Speaker | Author | Columnist | Trainer

Faculty Coordinators:

Dr. Manita D Shah | **Dr. Rashmi Akshay Yadav**
Professor | Assistant Professor

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