

# **Activity Report of Financial Literacy Club**

## **1. Establishment of Financial Literacy Club (8<sup>th</sup> August 2018)**

Department of MBA has signed a MoU with SWS Financial Solutions Pvt. Ltd. on 8<sup>th</sup> August 2018. Under this MoU, the department has stated Financial Literacy club in association with SWS Financial Solutions. The inauguration took place at the hands of Dr. K. S. Holkar (Principal), Mr. Raghuvir +Adhikari (CEO, SWS FSPL, Nashik), Mr. Aditya Hingne (Chief Manager, Sales, HDFC Asset Management Company, Nashik), Mrs. Rupali Kulkarni (Training Head, SWS FSPL, Nashik) and Dr. D. T. Khairnar (HoD, MBA). The objectives of the club are: To provide training and guidance on financial planning and wealth management to MBA Students, To provide summer internships to MBA Students, To provide placements and job opportunities to MBA students in Wealth Management sector.



**Mr. Aditya addressing the audience**

**a. Session on Mutual Fund by Mr. Sanjay Chudiwala (Manager, IDFC) (30<sup>th</sup> August 2018)**

The Department of MBA under the banner of Financial Literacy Club organized a session on “Mutual Fund Investment Awareness” on 30<sup>th</sup> August 2018. Mr. Sanjay Chudiwala (Manager, IDFC) was invited as resource person for the same. He demonstrated the growth of investment through Mutual Fund as an option. The students of MBA took the benefit of the session.



**Dr. D. T. Khairnar (HoD-MBA) felicitating Mr. Sanjay Chudiwala during the session**

**b. Session on Investment Planning by Mr. Rupesh Wagh (Manager, LIC) (11<sup>th</sup> September 2018)**

Department of MBA carries out various activities for staff members and students under Financial Literacy Club. One such activity “Mutual Fund Investment Awareness” was carried out on 11<sup>th</sup> September 2018. Mr. Rupesh Wagh (Branch Manager, LIC Mutual Fund, Nashik) was invited as resource person. Mr. Rupesh guided the audience regarding available investment option such as Gold, Real Estate, FDs, Stock Market, Mutual Fund etc. He also demonstrated the asset growth through these investment options. The staff members and students of the department took the benefit of the session.



**Mr. Rupesh Wagh guiding the audience**

**c. Quiz Competition by Mr. Raghuveer Adhikari (CEO, SWS Financial Solutions) (01<sup>st</sup> October 2018)**

Department of MBA under the banner of Financial Literacy Club organized a “Quiz Competition” on financial awareness for students of MBA department. The competition was organized on 1<sup>st</sup> October 2018. The participant students were awarded with the certificates.



**Mr. Raghuveer Adhikari addressing the students during the competition**

**d. Session on Wealth Creation by Mr. Raghuveer Adhikari (21<sup>st</sup> September 2018)**

Financial Literacy Club is a joint venture of NDMVPS’s KBT COE, Nashik & SWS Financial Solutions Pvt. Ltd., Nashik. Various financial literacy activities are regularly carried out through this club from time to time. One such activity “Wealth Creation” was carried out on 21<sup>st</sup> September 2018.



**Mr. Raghuveer Adhikari guiding the staff members**

**e. Session on Financial Planning, Wealth & Portfolio Management (29<sup>th</sup> January 2019)**

Department of MBA under the banner of Financial Literacy Club organized an expert session on financial planning, wealth & portfolio management for the students of MBA department. During the session, Mr. Raghuvveer Adhikari (CEO, SWS Financial Solutions) & Mrs. Rupali Kulkarni guided the students on benefits of proper financial planning.



**Mr. Raghuvveer Adhikari (CEO, SWS Financial Solutions) & Mrs. Rupali Kulkarni guiding the students during the session**

**f. Concluding Session of Financial Literacy Club for AY 2018-19 (20<sup>th</sup> March 2019)**

The concluding session of Financial Literacy Club for AY 2018-19, was organized in MBA Department on 20th March 2019. In this session Mrs. Rupali Kulkarni (SWS Financial) presented the journey of Literacy Club and activities carried out during the AY 2018-19. Mr. Raghuvveer Adhikari (CEO, SWS Financial Solutions) thanked to MBA Department and its students for active participation in various activities of the club and constant support.



**Certificate distribution to MBA Students during the concluding session**

**2. Activity Outcome & Student Experience:**

The students of MBA gained a thorough knowledge on Financial Planning, Wealth and Portfolio Management. Several students have placed in SWS Financial Solutions Pvt. Ltd., Nashik for their Summer Internships of A.Y. 2019-20.

**3. Assessment of the Activities Outcomes:**

Through competitions such as Quiz Competitions, Debates and Question-Answer sessions

**4. Feedback of the Students: Satisfied**

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