Perfect Your Way to Wealth Creation (Tips and Tools for Personal Finance)

10 September 2022 02:00 PM - 10 September 2022 05:00 PM

Brief Overview:

India is the fastest growing economy with a GDP of USD 2.9 trillion and estimated to reach 20 Trillion in 2040. This economic growth has fuelled investments to almost all sectors in India, from Retail investors, Institutions, VCs and Foreign investors leading to a robust growth in the space of Personal finance. The Insurance sector is growing at 9.9% CAGR, Mutual Funds have grown 5 fold in 10 years and manage an AUM of rupees 36 lac crores and number of demat accounts doubled in the last 3 years. We can be part of the growth story and create wealth if we acquire the Basic knowledge on multiple asset classes, different markets, and modern trends in investments and continue our investment journey in a disciplined way. The returns and risks go hand in hand and right knowledge helps to mitigate risks and optimise the returns. This course covers different facets of Personal Finance and the opportunities to create, grow, maintain and distribute wealth.

Session content:

- a) What is wealth creation?
b) The Personal finance, its 3 phases and rules
c) Risk, Returns, safety and its math
d) Goal based planning and execution
e) Different markets, asset classes and opportunities
f) Portfolio Management and Balancing
g) Learn concepts, practically using tools and platforms like investing.com, Morning Star, NSE, Fundexpert, Upstox, Screener.in, Financial calculators and Excel based tools

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For Whom:

- Any individual in Service, Professional practice, Business owner, Home maker and students
Anyone who wants to achieve financial freedom by following a disciplined investment model
Anyone who wants to understand the risk adjusted returns

Key Takeaways:

Participants at the end of the session will be able to :

Understand the importance of Savings, investments and its growth
Know about multiple asset classes and how to select the right asset class
Importance of goal based planning and execution
Know about various tools to invest, monitor and evaluate your investments.
Perfect your way to wealth
Remove the phobia on market linked asset classes
Invest into peace of mind

Facilitator profile:

Suresh P N

Suresh is passionate about Personal Finance and is a SEBI registered Mutual Fund Distributor, using an automated, free online investment platform.

Suresh PN has successfully ramped up Business assignments for Corporate like DCM, Wipro, eComServer etc. and held senior roles in Sales, Marketing, Operations and PL responsibility.

As a Business consultant, he has mentored Start-ups in Strategy, Operations and Funding.

Suresh is an Engineer, MBA (Marketing and Finance) and has done specializations in Hospital Management, Energy Management, Enterprise Risk Management, and Cyber Laws. He is a member of various professional bodies, Industry associations and a visiting faculty for leading management institutes.

Fee Details:

- **Fee Details**
- Member amount : Rs 650.00- (Including 18%GST)
- Non Member amount : Rs 780.00- (Including 18%GST)
- Total Member count :