



MAHARAJA AGRASEN INSTITUTE OF MANAGEMENT STUDIES

A Unit of Maharaja Agrasen Technical Education Society
Affiliated by GGSIP University, Recognised u/s 2(f) of UGC
Approved by Bar Council of India; ISO 9001:2015

Certified Institution courses offered: BBA, BCom(H), BA(H)Eco, BA(JMC), BA LLB, BBA LLB

Campus: Maharaja Agrasen Chowk, Sector-22, Rohini, Delhi-110086, India

www.maims.ac.in



FINVERSION - THE FINANCE SOCIETY OF MAIMS

is organising an Add-on Course

FINANCIAL LITERACY 2.0: MUTUAL FUNDS DEMYSTIFIED

NOVEMBER - DECEMBER
(ONLINE)

CLICK HERE TO REGISTER

<https://forms.gle/mS58DkJJ37byHsFG8>





About Maharaja Agrasen Technical Education Society

Maharaja Agrasen Technical Education Society (MATES) is a charitable trust comprising of a group of well – known Educationists, Industrialists, Businessmen, Professionals and Philanthropists with an aim to promote equality education in the field of Technology, Management, Law, Pharmacy and Health Services to shape the human society for a better future. Dr. Nand Kishore Garg (Founder & Chief Advisor – MATES, Chancellor – MAU, three times MLA – Delhi Vidhan Sabha) has been a significant source of inspiration and motivation for achieving the aims and goals of the society.

About Maharaja Agrasen Institute of Management Studies

MAIMS was established in 2003 by Maharaja Agrasen Technical Education Society. The institute has attained a distinct position in running BBA, B.Com (H), BA (H) Eco., BA (JMC), BA LLB (integrated) and BBA LLB (integrated) programs affiliated with Guru Gobind Singh Indraprastha University, Delhi. The institute was granted ISO certification 9001:2015 after meeting the updated requirements of ISO certification. MAIMS has over the years grown into a premiere center of excellence and has made its niche in the areas of teaching, research, consultancy and corporate development.

About Department of Business Administration

The legendary Department of Business Administration was started by MAIMS in the year 2003 with BBA (G) program. Since then it has upheld its position as one of the finest departments. It has shaped many eminent personalities who are successful entrepreneurs today and has led to many business ventures. Management is a prestigious profession which enjoys high social recognition in the society. There is an increasing attention towards management education, due to its growing demand as practitioners, researchers and social scientists. BBA (G) programme enhances the professional skills of the students, which are necessary for attaining a high level of economic activities. The BBA (G) programme also promotes the understanding, predicting and guiding of human behaviour in organizations.

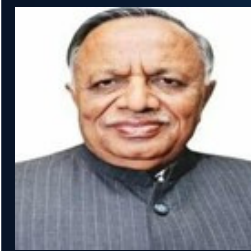
Course Description

This is an advanced course designed to empower individuals with the knowledge and skills needed to navigate the complex world of mutual funds effectively. Building on the foundational concepts of financial literacy, this course delves deep into mutual funds, offering a comprehensive understanding of their types, strategies, and the role they play in wealth building and investment portfolios. Students will learn to evaluate and select mutual funds, decipher performance metrics, and construct diversified portfolios. Through real-world case studies and practical exercises, participants will gain the confidence and expertise necessary to make informed investment decisions, optimize returns, and achieve their financial goals in an ever-changing financial landscape. This course will equip the students with the tools to master mutual funds and take control of their financial future.



MAHARAJA AGRASEN TECHNICAL EDUCATION SOCIETY (MATES), DELHI

Dr. Nand Kishore Garg
Founder & Chief Advisor, MATES
Chancellor, Maharaja Agrasen University, Baddi, HP



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FINANCIAL LITERACY 2.0

ORGANISING TEAM



Dr. Manoj Verma

Head, Department of Business Administration
Program Head



Ms. Anu Goyal

Assistant Professor
Convenor



Dr. Sanam Sharma

Assistant Professor (Senior Scale)
Co-Convenor

About Mutual Funds

Mutual funds are a dynamic and accessible investment option that pools money from numerous investors to create a diversified portfolio of stocks, bonds, or other securities. This collective approach allows individuals, even with modest amounts to invest, to benefit from professional fund management and a diversified asset base. Investors in mutual funds essentially buy shares, gaining proportional ownership of the fund's holdings. These funds are managed by experienced investment professionals, aiming to maximize returns while minimizing risk.

Mutual funds cater to various risk appetites and financial goals, making them versatile tools for both beginners and seasoned investors. By demystifying mutual funds, this course equips participants with the essential knowledge to navigate the world of investments and build a solid foundation for financial success.

Objectives of Financial Literacy 2.0

- Gain a comprehensive understanding of the mutual fund industry's evolution and regulatory framework.
- Differentiate between the Indian and global mutual fund industries and their key characteristics.
- Develop skills for fund selection, risk assessment, return calculation, and performance evaluation.
- Learn to incorporate tax-efficient mutual fund strategies into comprehensive financial planning.
- Explore ethical conduct and best practices outlined in the AMFI Code of Conduct for ethical investing and advising.

Schedule

Lec. No.	Topics
1	Evolution and Regulatory Framework - Mutual Fund Industry
2	Mutal Fund Industry - India vs Rest of the World
3	Structure of Mutual Funds
4	Mutual Fund Classification
5	NFO & Offer Documents
6	Investment in Mutual Funds
7	Measuring Risks associated with Mutual Funds
8	Calculation of Return associated with Mutual Funds
9	Measuring and Evaluating Mutual Fund Performance
10	Taxation Aspects of Mutual Funds
11	Financial Planning using Mutual Funds
12	Risk Management Associated with the Mutual Fund Industry
13	Marketing, Distribution, Sales & Investor Services related to Mutual Funds
14	AMFI Code of Conduct - Ethics and Best Practices
15	Quiz

Requirements for issue of certificate:

- 80% or more attendance
- Submission of solutions/answers of all assignments
- Submission of weakly feedbacks
- Project Submission

Days: Monday - Friday

Time: 3:00 - 5:00 PM

Duration: 30 hours

Who should attend?

- Undergraduate students from all streams
- Post Graduate Students
- Faculty Members and teachers of universities/colleges, research scholars/Ph.D. scholars

Registration Details

Fee Structure

Internal Participants - ₹200

External Participants - ₹500

*Early Bird Registration - 15th October

Last Date for Registration - 30th October

Payment Details

MODE OF PAYMENT THROUGH UPI

UPI ID: 8376935455@paytm

*Registration for early birds will be at 50% off

Course completion certificate will be given to the participants subject to fulfilling the attendance and assignment criteria

Contacts

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