



# Maharaja Agrasen Institute of Management Studies

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Maharaja Agrasen Chowk, Sector 22, Rohini, Delhi – 110086, INDIA [www.maims.ac.in](http://www.maims.ac.in)



10<sup>th</sup> December, 2024

## Department of Business Administration

### REPORT

#### Skill Enhancement Certificate Course

On

“Financial Literacy 2.0: Mutual Funds Demystified”

Academic Year 2023-24

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**Event Title:** Financial Literacy 2.0: Mutual Funds Demystified

**Organizing Unit:** Finversion Society (Department of Business Administration)

**Institution Head:** Prof. (Dr.) Rajni Malhotra Dhingra

**Event Convener and Co- Convener:** Ms. Anu Goyal and Dr. Sanam Sharma

**Event Date:** 1<sup>st</sup> November, 2023 – 8th December, 2023

**Duration:** 30 Hours

**Days:** Monday, Wednesday & Friday for first batch

Tuesday, Thursday & Saturday for second batch

**Event Time:** 3:00 PM – 5:00 PM (Monday to Friday)

**Resource Persons:** Dr. Ekta Dargan, Dr. Sanam Sharma, Ms. Anu Goyal, Dr. Tanu Aggarwal, Dr. Monica Sharma, Dr. Shallu Aggarwal, Dr. Shweta Goel

**Event Location:** Online

**Total Participants:** 200 BBA Students

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## **Event Overview**

The *Financial Literacy 2.0: Mutual Funds Demystified* course, conducted by the Finversion Society of Maharaja Agrasen Institute of Management Studies (MAIMS), aimed to equip BBA students with advanced knowledge and practical skills related to mutual funds. Spanning November and December 2024, the course offered a deep dive into mutual funds, emphasizing their role in financial planning and wealth management.

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## **Importance of the course**

Mutual funds are pooled investment vehicles that enable individuals to invest in a diversified portfolio of securities managed by professional fund managers. They cater to varying financial goals and risk appetites, offering individuals a robust platform to grow wealth efficiently. This course focused on simplifying mutual fund concepts, empowering students to make informed financial decisions.

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## **Purpose of the Course**

The main objectives of the course were to:

1. Develop an understanding of mutual funds and their role in investment strategies.
  2. Equip students with skills to evaluate and select mutual funds effectively.
  3. Explore advanced techniques for risk management and performance evaluation in mutual funds.
  4. Highlight ethical investing practices under the AMFI Code of Conduct.
  5. Introduce tax-efficient investment strategies for financial planning.
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## **Report**

Maharaja Agrasen Institute of Management Studies, Department of Business Administration, through its Finversion Society, organized a Skill Enhancement Certificate Course “Financial Literacy 2.0: Mutual Funds Demystified.” The course was conducted exclusively for undergraduate BBA students of MAIMS. The classes were held online from 1st November 2023 to 8th December 2023, with a total duration of 30 hours. The sessions were scheduled three days a week: Monday, Wednesday, and Friday for the first batch, and Tuesday, Thursday, and Saturday for the second batch. Each session lasted two hours, and 200 students participated in the course.

The course aimed to provide students with in-depth knowledge of mutual funds, focusing on their role in investment strategies, financial planning, and wealth management. It was designed to equip students with the skills to evaluate and select mutual funds effectively, understand risk management, and apply advanced techniques in performance evaluation.

Additionally, the course introduced ethical investing practices under the AMFI Code of Conduct and tax-efficient investment strategies for financial planning.

The certificate course was led by the conveners, Ms. Anu Goyal and Dr. Sanam Sharma, and conducted by a team of resource persons, including Dr. Ekta Dargan, Dr. Tanu Aggarwal, Dr. Monica Sharma, Dr. Shallu Aggarwal, and Dr. Shweta Goel. The course also featured case studies and practical applications, enabling students to navigate real-world scenarios and build diversified investment portfolios. Students were evaluated through quizzes with certification based on attendance, feedback, and performance.

The credit for this initiative goes to Dr. Manoj Verma, Chief Coordinator of the Programme and Head, of the Department of Business Administration who worked under the able guidance of Prof. (Dr.) Rajni Malhotra Dhingra, Director, MAIMS. Their constant support and encouragement helped in the successful accomplishment of this course.

The valedictory session for the course was held on 12th December 2023, where certificates were distributed to all 200 students who completed the course and the resource persons. The course provided valuable insights and practical tools for students, preparing them for careers in finance and investment, while enhancing their employability in the competitive financial sector.

## **Key Highlights**

- 1. Comprehensive Mutual Fund Insights:**  
The course covered mutual fund classifications, structure, and the role of these funds in diversified investment portfolios.
- 2. Risk and Return Analysis:**  
Students were trained in assessing mutual fund risks, calculating returns, and understanding their impact on long-term financial growth.
- 3. Taxation and Compliance:**  
An emphasis on taxation aspects and AMFI Code of Conduct helped students gain insights into regulatory frameworks and ethical investing practices.
- 4. Technological Integration in Financial Planning:**  
Participants explored tools and techniques used to construct and evaluate mutual fund portfolios, ensuring effective financial planning.
- 5. Case Studies and Practical Application:**  
Real-world scenarios and case studies were included to provide hands-on experience in navigating mutual funds and building diversified portfolios.

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## **Conclusion**

The *Financial Literacy 2.0* course was a highly enriching and practical learning experience for BBA students at MAIMS. It offered them an opportunity to develop critical financial skills necessary for understanding mutual funds and their role in strategic financial planning. The course not only broadened their theoretical knowledge but also equipped them with practical tools to navigate the dynamic financial markets confidently.

The successful completion of the course is expected to significantly enhance the participants' academic knowledge and prepare them for prosperous careers in the finance and investment sector.

### Faculty Co-ordinator

Ms. Anu Goyal (Convenor)

Dr. Sanam Sharma (Co- Convenor)



