



TECNIA INSTITUTE OF ADVANCED STUDIES

NAAC ACCREDITED GRADE "A" INSTITUTE

Approved by AICTE, Ministry of HRD, Govt. of India, Affiliated to GGSIP University
Recognized Under Sec. 2(f) of UGC Act 1956

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Training and Placement Cell

EVENT REPORT

TECNIA
INSTITUTE OF ADVANCED STUDIES
NAAC ACCREDITED GRADE "A" INSTITUTE
DELHI INDIA

HER MONEY TALKS

BSE

Organised by
Training and Placement Cell

HERMONEYTALK IN ASSOCIATION WITH BSE INDIA LTD PRESENTS

Webinar On
Tips for Managing Financial Portfolio

Dr. Ajay Kumar
Director
TIAS

Nidhi Kothari
Financial Coach,
HerMoneyTalks

Heena Lal
Training & Placement Officer
TIAS

विश्व निवेशक सप्ताह 2021
World Investor Week 2021
22-28 नवम्बर, 2021
November 22-28, 2021

निवेश से पहले रखें पता हर बात का - तभी खुलेगा आर्थिक आत्मनिर्भरता का रास्ता
Investing with Knowledge - Way to Financial Independence

भारतीय प्रतिभूति और विनियम बोर्ड
Securities and Exchange Board of India

WORLD INVESTOR WEEK 2021

Join us:- <https://bit.ly/3xeYIM6>
Date: 27-Nov-2021 Time : 12:00 PM Onwards

in association with
Sanskriti University, Vision Institute of Advanced Studies, (APG)

<https://us02web.zoom.us/meeting/register/tZwtcOisrj8tH93oi9zErmXht1474GSv8Ana>

Event:	Webinar
Topic:	Tips for Managing Financial Portfolio
Date:	27/11/2021
Time:	12:00 PM Onwards
Platform:	ZOOM
Students:	BCA/MBA (Final Year)
Topic:	Tips for Managing Financial Portfolio
Faculty In charge:	Dr. Sonal Dahiya, Associate Professor, TIAS, Ms. Shilpa Bhandari, Assistant Professor, TIAS
Convener:	Heena Lal, Training & Placement Officer, TIAS
Beneficiaries:	36

Resource Person:

Ms. Nidhi Kothari – Financial Coach, HerMoneyTalks

OBJECTIVES:

- To make the students understand their current finances, financial goals and strategies to achieve those goals.
- To make the students understand short- and long-term liquidity needs.
- To make the students understand about importance of Financial Evaluation and Strategy: Corporate Finance
- To make the students understand about investment decisions that creates value for shareholders.

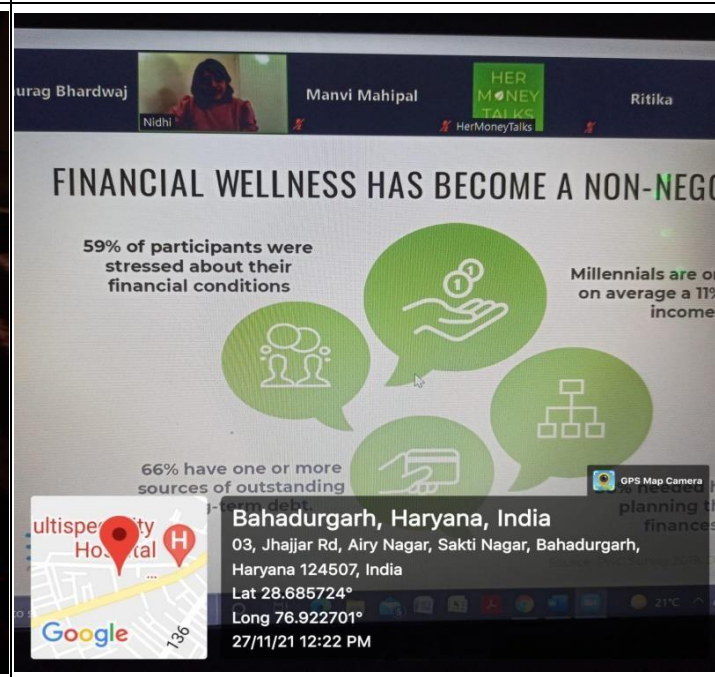
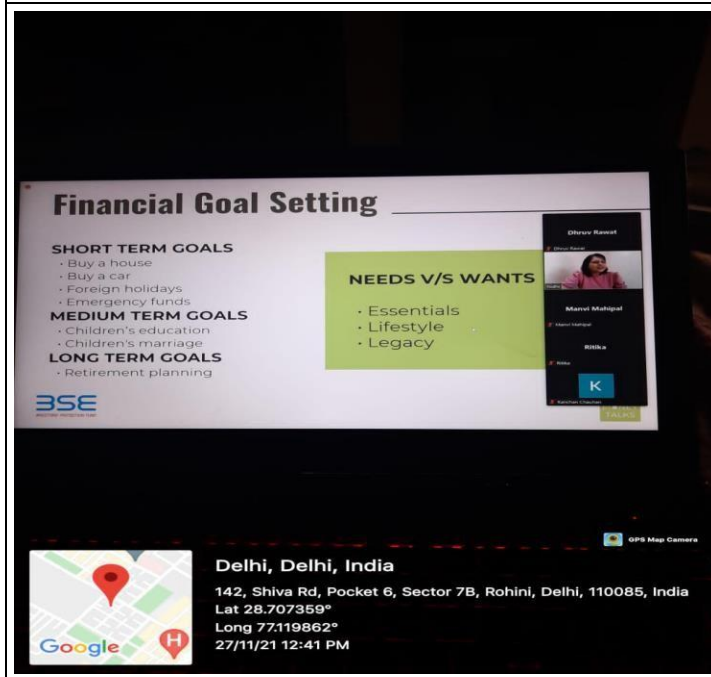
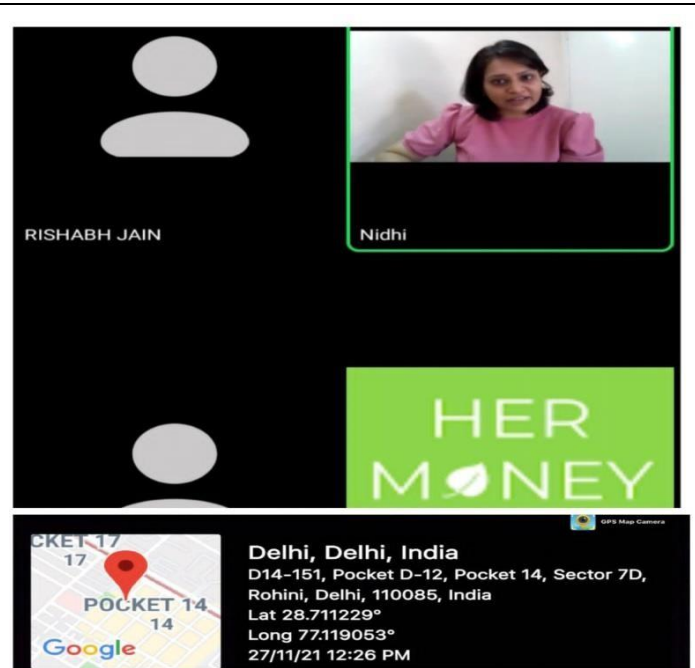
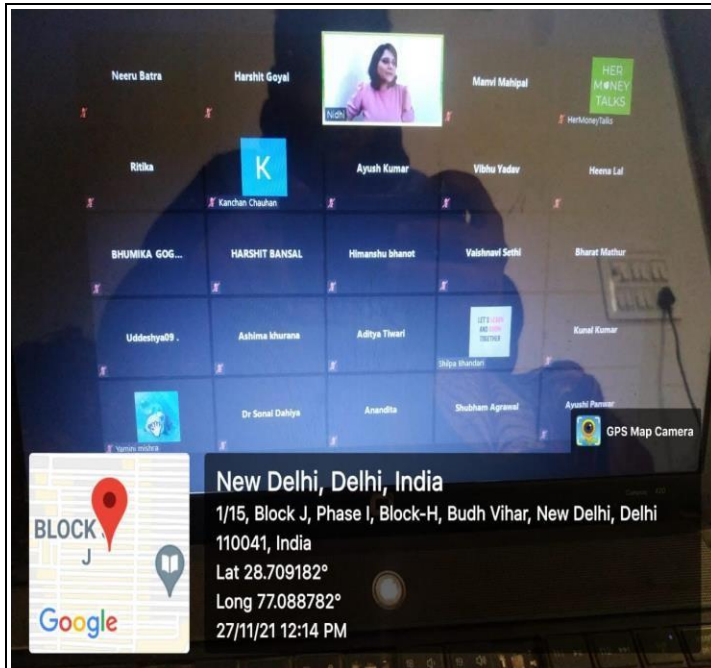
REPORT:

Webinar on Tips for Managing Financial Portfolio was conducted on 27/11/2021 for BCA and MBA students by the T&P cell of TIAS. The objective of this session was to make the students understand their overall financial quotient. Speaker for the session was Ms. Nidhi Kothari– Financial Coach, HerMoneyTalks and the Convener was Ms. Heena Lal (TPO). The Speaker conveyed financial concepts to the students and guided them how to achieve one’s financial goals. She also highlighted few other aspects in the session like qualities of prudent investors, Investment instruments, Capital markets, Stock market trading etc. It was very interactive session and was well received by 36 students who attended the session. Post the session students were asked to fill the feedback form.

Learning Outcomes:

- Students understood the importance of analyzing one’s financial goals and strategies to achieve those goals.
- Students got an overview regarding short- and long-term liquidity needs.
- Students understood the importance of Financial Evaluation and the Strategy to manage it.
- Students understood investment decisions that create value for shareholders.

Screen shots of the webinar:



Attendance & Feedback:

S.No	Name	Roll No	Does Financial planning helps you set and reach your goals.	Importance of Financial Planning as per you	Was the Session helpful for you and how	What did you learned regarding Financial portfolio after the session	Please share your feedback for the session	Are you facing any challenges with planning your finances or getting any information
1	Varun Tandon	517003920	yes	Future safety	Yes	.	.	.
2	Manisha Chhabra	1317003920	yes	Very important for good future	Yes very helpful	Importance in future	It was a great session	No
3	Vishali	2417003920	yes	It helps me to understand my goal in a better way	Yes	Manage finance, investment decisions, etc.	Session is very good	Yes
4	Anurag Bhardwaj	817002020	yes	Stay focused	Yes	Investing is the key	It was awesome	No
5	Anandita	317002019	yes	Security+ a better tomorrow.	Yes.	.	Helpful and valuable session	Not yet.
6	Kailash Talreja	117003920	yes	Great importance	yes, Best content	make portfolio according to your risk profile	excellent	No
7	Shivani	3717002020	yes	Helps me to analysis the future expenditure	Yes	It's important		Yes
8	Sourabh jha	121303920	yes	Well planned financial statements will lead to the growth in the money market.	Yes, it was helpful and knowledgeable	Investment in shares and mutual fund.	Session was very informative.	No
9	Chahat	3717002019	yes	It provides direction to your goals or dreams. Financial planning helps you understand your goals better in terms of why you need to achieve these goals and how they impact other aspects of your life and finances. Planning encourages you to manage inflation.	Yes	Without an investment portfolio, an individual may be unprepared for some of the major milestones in life. Placing money in a bank savings account may protect money, but growth is likely to	It was an excellent session.	No

						Be highly modest in comparison with the potential profits in the financial markets. By having an investment portfolio, an investor can not only invest to guard his capital but also position the portfolio to potentially earn sizable profits so that he is prepared for events such as funding a college education.		
10	Himanshu Bhanot	1017003920	yes	Financial planning can't be neglected because in each and every step you somehow have to set your finance according to your needs and goals.	Yes	Learned about different form of investment, what is inflation and how you can overcome Inflation.	Quite insightful	As of now, no
11	Geetanshi Arora	4917002019	yes	Provide directions to goals or dreams	Thank you very much! This was the best session I attended in weeks.	Picking a range of assets to minimize your risks while maximizing your potential returns is a good rule of thumb.	Excellent	No
12	Vaishnavi Sethi	217003920	yes	Provides direction to your goals or dreams. Financial planning helps you understand your goals better in terms of why you need to achieve these goals and how they impact other aspects of your life and finances. Planning encourages you to manage inflation.	-	-	-	-
13	Vasu Jain	4417002020	yes	It helps us to plan and spend money wisely otherwise we don't plan financially we will	Yes it was so much	It was so much helpful for me because after that I can set my mind	Excellent	Nothing

				Be in trouble in future.	help full for me because after that i can set my mind set as how i can spend money inproper form without wasting Money.	set as how i can spendmoney in proper formwithout wasting money.		
14	kunika maindola	2810002019	yes	yes	yes	yes	nice	no
15	Bharat Mathur	717003920	yes	Adequate funds have to be ensured, Financial Planning helps in ensuring a reasonable balance between outflow and inflow of funds so that stability is maintained	Yes.	.	It was very informative session.	No
16	Muskan Sharma	1517003920	yes	It help in budget making	Yes	Most of the things	Helpful	No
17	Dhruv Rawat	1517002020	yes	It provides direction to your goals or dreams.	Yes	Portfolio diversification, meaning picking a range of assets to minimize your risks while maximizing your potential returns, is a good rule of thumb.	Excellent	No
18	Shubham Agrawal	1817003920	yes	Manage expenses	Yes	How to manage it	Na	No
19	Namrata Kharbanda	1617003920	yes	It help in making systematic budget	Yes	I learned many things	It was good	No
20	Manvi Mahipal	1417003920	yes	for getting edge in career	yes	clarity on most financial parts	excellent	no
21	Simran Gandhi	1917003920	yes	Financial planning helps us in management of life	Yes very informative	Financial assets owned by individual	Informative and good	No
22	AYUSH	35217003920	yes	We get the idea that how much we have to spend	Yes, somehow I gain more knowledge	That we have to makeproper budget	It was good and helpful	Not much
23	Vibhu yadav	2217003920	yes	Help in finance management	Knowledge shared by guest	How to managefinance	Great session	None

24	Sanchit gupta	317003920	yes	Achieving goals with minimum risk taking and increasing profits	Yes i learn very new things from it	How to manage and deal with it	Excellent	Before but not after the seminar
25	Uddeshya jain	35317003920	yes	Very important	Yes it was	Financial decisions	Pretty good	No
26	Dishank Jain	1617002020	no
27	Priyanshi Jain	3117002020	yes	It helps us to reach our goals.	Yes	It is important to make financial Portfolio.		Yes
28	Ashima khurana	3017002019	yes	It helps us to save money and how to spend money	Yes	How to manage it	Excellent	Yes
29	Aditya Tiwari	2017002019	yes	Helps to have financial independence	Yes, i got to know much about financial services and other financial field	Financial portfolio should be divided properly like 50/30/20	It was very good session got knowledge about finance	Nope it's fine
30	Sara Negi	4517002019	yes	It helps to be independent.	It was Very beneficial	We learnt about the importance of Financial planning.	It was a very good session.	No
31	Varsha Pandey	3917002019	yes	Financial planning helps us to be independent	Yes it was very helpful because it gives me the idea of financial planning and management	We learned about the management and financial planning.	It was a very good session	No
32	Tushar Sohal	1217002019	yes	Yes	Yes	Yes	Good	No
33	Mudit	4317002019	yes	Achievement of your goals	Yes	It's helps us in making our mind	5	No

34	Yash bisht	1317002019	yes	It is important as if we are well planned we able to manage our expenses and save more money	It wasgood	To act in well plannedmanner	Good session	No
35	Naman	35417002019	yes	Very important	Yes	Very much	Wow	No
36	Kareena Gaba	3117002019	yes	Financial planning helps in deciding our priorities beforehand so that we don't feel burden at the end of the month.	Yes, it was very helpful. Heena mam helped Us a lot.	It is very crucial for everyday survival.	Very informative.	No