



MANIPAL UNIVERSITY  
JAIPUR

MUJ/Q&C/021/F/1.01

Event Report Format



MANIPAL UNIVERSITY  
JAIPUR

**FACULTY OF MANAGEMENT & COMMERCE**

**SCHOOL OF BUSINESS & COMMERCE**

**DEPARTMENT OF COMMERCE**

**Indian Markets and Financial Planning**

**08 November 2023**

  
Head  
Department of Commerce  
Manipal University Jaipur

Dr Saurabh Sharm

HoD, COMMERCE



## **Content of Report**

1. Introduction of the Event
2. Objective of the Event
3. Beneficiaries of the Event
4. Details of the Guests
5. Brief Description of the event
6. Program Scheme
7. Lecture Plan
8. Photographs
9. Brochure or creative of the event
10. Attendance of the Event
11. Link of MUJ website



## 1. Introduction of the Event

The curriculum-based industry expert lecture was conducted on 'Indian Markets and Financial Planning'. In the world of the financial market, it is very important to understand how the financial market adopts changes with the passage of time. Also, the scope of financial planning in the market.

## 2. Objective of the Event

The objective of conducting this expert talk is to provide knowledge about Indian investment markets and financial planning. Enlightening students about investment strategies to grow and protect their wealth. To provide an insight into various investment opportunities and assets classes.

## 3. Beneficiaries of the Event

Students of B.com (Pass), B.com (Hons.), and M. Com.

## 4. Details of the Guests

CMA Purnima Goyal

## 5. Brief Description of the event

The speaker interacted with students and made them aware of savings and how to invest them in the financial market with proper planning. She explained why it is important to do financial planning at an early age to get the maximum returns and the importance of investing in good companies in the market for long periods of time. Students also got to know about risk management techniques and how to mitigate investment risks during financial planning.

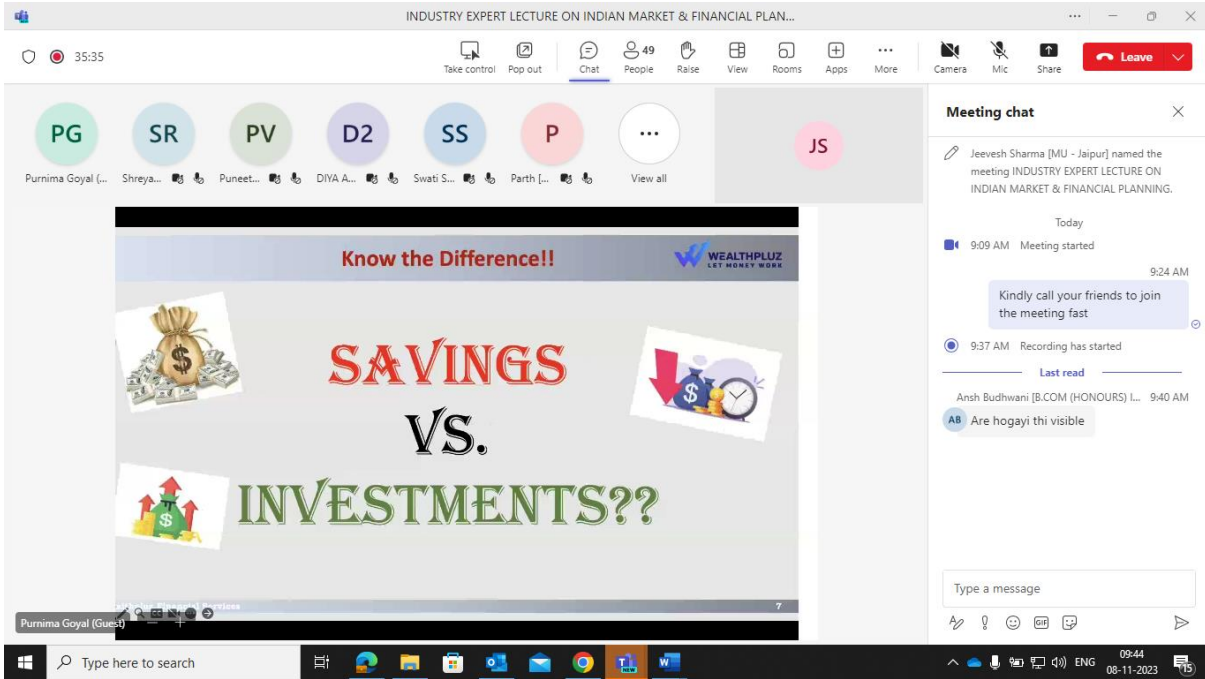
## 6. Program Scheme

SEMESTER III						
Course No.	Subject Code	Subject Title	L	T	P	C
4	BH2106	Financial Market Operations	3	0	0	3

## 7. Lecture Plan

Sr. No.	Course Code	Topics
1	BH2106	Introduction to Indian Financial Market.
2	BH2106	Types of Financial Market.
3	BH2106	Overview of Indian Financial Market.
4	BH2106	Introduction to Money Market and Money Market: Composition.
6	BH2106	Structure of Indian Money Market.
7	BH2106	CA Harshat Mehta Case Study.
8	BH2106	Concept of Discount houses.
9	BH2106	Concept of call money markets.
10,11	BH2106	Recent Trends in Indian Money Market.
12	BH2106	Introduction of BSE (Bombay Stock Exchange).
13,14	BH2106	Basic Terms and Functions of BSE.
15	BH2106	Basic Functions of BSE.
16	BH2106	Introduction to NSE (National Stock Exchange).
17	BH2106	Explain various functions of NSE.
18,19, 20	BH2106	Online trading through BSE and NSE.
21, 22	BH2106	Capital Market: Meaning Relationship between Money market and Capital Market.
23	BH2106	Concept of Listing with recent examples
24, 25	BH2106	Comprehensive Listing Procedure
26, 27, 28	BH2106	Concept of Listing with recent examples
29	BH2106	New issue Market (IPO)
30	BH2106	Role of stock exchange in Financial Sector of the Economy.
31, 32, 33	BH2106	Brokers, Sub- Brokers, FII, Institutional Investors, Jobbers, Portfolio Consultants.
34	BH2106	Introduction of Security Contract Regulation Act, Grievance cells.
35	BH2106	Security Contract Regulation Act – Main Provisions.
36	BH2106	Investors Protection & Grievances concerning stock exchange dealing and their removals.
37	BH2106	FEMA Act 2000
38	BH2106	Financial services- merchant banking
39	BH2106	Revision Classes

## 8. Screenshots of the event



INDUSTRY EXPERT LECTURE ON INDIAN MARKET & FINANCIAL PLAN...

35:35

Take control Pop out Chat People Raise View Rooms Apps More Camera Mic Share Leave

PG SR PV D2 SS P JS

Purnima Goyal (...), Shreya..., Puneet..., DIYA A..., Swati S..., Parth [...], View all

**Know the Difference!!**

WEALTHPLUZ LET MONEY WORK

**SAVINGS VS. INVESTMENTS??**

Meeting chat

Jeevesh Sharma [MU - Jaipur] named the meeting INDUSTRY EXPERT LECTURE ON INDIAN MARKET & FINANCIAL PLANNING.

Today

9:09 AM Meeting started

9:24 AM Kindly call your friends to join the meeting fast

9:37 AM Recording has started

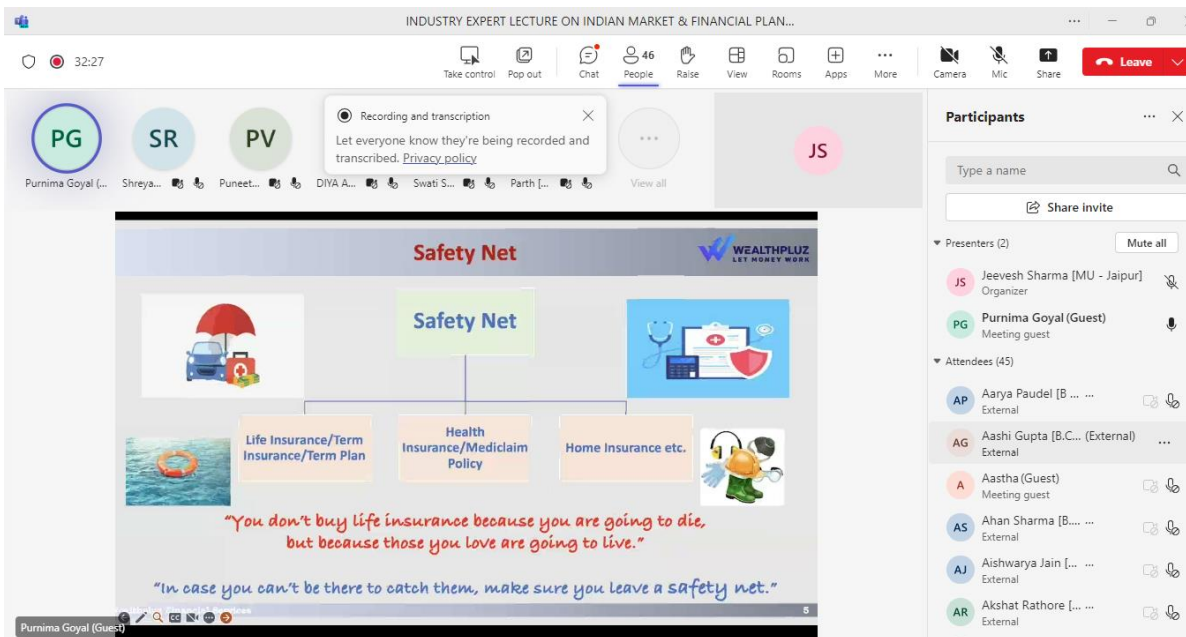
Last read

Ansh Budhwani [B.COM (HONOURS) I...] 9:40 AM

AB Are hogayi thi visible

Type a message

09:44 08-11-2023



INDUSTRY EXPERT LECTURE ON INDIAN MARKET & FINANCIAL PLAN...

32:27

Take control Pop out Chat People Raise View Rooms Apps More Camera Mic Share Leave

PG SR PV JS

Purnima Goyal (...), Shreya..., Puneet..., DIYA A..., Swati S..., Parth [...], View all

Recording and transcription  
Let everyone know they're being recorded and transcribed. [Privacy policy](#)

**Safety Net**

WEALTHPLUZ LET MONEY WORK

**Safety Net**

Life Insurance/Term Insurance/Term Plan

Health Insurance/Medicaid Policy

Home Insurance etc.

"You don't buy life insurance because you are going to die, but because those you love are going to live."

"In case you can't be there to catch them, make sure you leave a safety net."

Participants

Type a name

Share invite

Presenters (2) Mute all

- JS Jeevesh Sharma [MU - Jaipur] Organizer
- PG Purnima Goyal (Guest) Meeting guest

Attendees (45)

- AP Arya Paudel [B... External]
- AG Aashi Gupta [B.C... (External) External]
- A Aastha (Guest) Meeting guest
- AS Anan Sharma [B... External]
- AJ Aishwarya Jain [... External]
- AR Akshat Rathore [... External]

INDUSTRY EXPERT LECTURE ON INDIAN MARKET & FINANCIAL PLAN...

33:05

Take control Pop out Chat People 46 Raise View Rooms Apps More Camera Mic Share Leave



## Goal Planning

**Individual Needs : Investment Goals**

Every Individual has one or more of the below goals.

Every Individual needs to save :

- Retirement
- Child's Education/Marriage
- Medical Emergency
- Vacations
- Dream Home
- Dream Car
- Other Family Obligations
- .....contd.

PG SR  
Purnima Goyal (Guest) Shreya...

PV D2  
Puneet... DIYA A...

SS P  
Swati S... Parth...

SB ...  
Sarad... View all

6

Purnima Goyal (Guest)


INDUSTRY EXPERT LECTURE ON INDIAN MARKET & FINANCIAL PLAN...

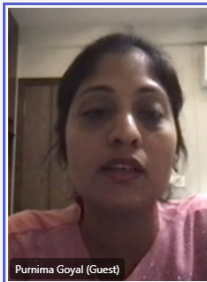
02:15:50

Take control Pop out Chat People 52 Raise View Rooms Apps More Camera Mic Share Leave

## so...What to do Now..?

- Risk Assessment
  - Term Insurance
  - Health Insurance
  - Home Loan Insurance
  - Home Insurance
- Save **Emergency Corpus** of at-least 6-12 Months in FD/RD/Liquid MF.
- Goal Identification & Goal Planning. Start **SIP Investments**.
- Do Invest in **PPF/SSY** social welfare schemes run by GOI.
- Invest in **Sovereign Gold Bonds/Debt Mutual Funds**.
- Keep a check on **Asset Allocation** as per your requirements.
- KYC, Client Onboarding on Portal, Goal Planning & Roadmap Preparation.





Purnima Goyal (Guest)

SR ...  
Shreya... View all

JS

33

Purnima Goyal (Guest)

Type here to search

11:24 08-11-2023



INDUSTRY EXPERT LECTURE ON INDIAN MARKET & FINANCIAL PLAN...

02:20:11

Take control Pop out Chat People 51 Raise View Rooms Apps More Camera Mic Share Leave

Participants

Type a name

Share invite

- D2 Meeting guest
- DB Diya Bajaj [B.CO... (External) External
- DV Diya Verma (Guest) Meeting guest
- DJ Dr. Swati Jain [MU - Jaipur]
- HS Hemant Sharma [B Com (Hon...]
- H Hunny [B.COM (... (External) External
- IA Ishita Agarwal [B... (External) External
- KS Kartik Singhal [B... (External) External
- KP Khushi pandey (Guest) Meeting guest
- MB Manan Bansal [B... (External) External

**Thank You!**

**CMA PURNIMA GOYAL**

**+91-8114473239**

**+91-9784637923**

Purnima Goyal (Guest)

Type here to search

11:29 08-11-2023

INDUSTRY EXPERT LECTURE ON INDIAN MARKET & FINANCIAL PLAN...

02:06:09

Take control Pop out Chat People 54 Raise View Rooms Apps More Camera Mic Share Leave

**The Proof of the Pudding...is in the eating**

**SIP Calculator**

Monthly SIP	SIP Duration (in Months)	Expected Return (%)
2000	120	14.00

**SIP Planning Calculation**

SIP Investment Summary	Principal Amount & Growth Breakup
Total SIP Amount Invested Rs. 1,20,000	
Total Growth Rs. 1,39,547	
Total Future Value Rs. 2,59,547	

**SIP Investment Projected Value**

**SIP Calculator**

Monthly SIP	SIP Duration (in Months)	Expected Return (%)
2000	360	14.00

**SIP Planning Calculation**

SIP Investment Summary	Principal Amount & Growth Breakup
Total SIP Amount Invested Rs. 3,60,000	
Total Growth Rs. 49,95,746	
Total Future Value Rs. 53,55,746	

**SIP Investment Projected Value**

Participants

- PG Purnima Goyal (...)
- SR Shreya Ras...
- SS Swati S...
- P Parth [...]
- SB Sarad ...
- SS Sartha...
- PV Prakha...
- View all
- JS

Purnima Goyal (Guest)

Type here to search

11:15 08-11-2023

## 9. Brochure of the event



The brochure features a light yellow background with decorative elements including gold coins with dollar signs and a green plant with gold coins growing from it. At the top left is the Manipal University Jaipur logo and name. At the top right is a NAAC A+ accreditation badge. The central text reads: 'DEPARTMENT OF COMMERCE IS ORGANIZING AN INDUSTRY EXPERT LECTURE ON INDIAN MARKET & FINANCIAL PLANNING'. Below this is a portrait of CMA Purnima Goyal, with a yellow 'SPEAKER' badge underneath. Her details are: 'CMA PURNIMA GOYAL, Co-Founder, WealthPluz Financial Services'. To the right, a yellow 'INFORMATION' badge contains the event details: 'Date: 8 Nov. 2023, Time: 9:30am-12:30pm, Venue: MS Teams'. At the bottom, it lists the conveners: 'Dr. Jeevesh Sharma and Dr. Swati Jain'. An illustration of two women tending to a plant with gold coins is on the left side.

**MANIPAL UNIVERSITY JAIPUR**  
University under Section 2(f) of the UGC Act

**ACCREDITED WITH GRADE A+ NAAC**

**DEPARTMENT OF COMMERCE  
IS ORGANIZING  
AN  
INDUSTRY EXPERT LECTURE  
ON  
INDIAN MARKET & FINANCIAL PLANNING**

**SPEAKER**

**CMA PURNIMA GOYAL**  
Co-Founder  
WealthPluz Financial  
Services

**INFORMATION**

**Date: 8 Nov. 2023  
Time: 9:30am-12:30pm  
Venue: MS Teams**

**Conveners; Dr. Jeevesh Sharma and Dr. Swati Jain**

[https://teams.microsoft.com/l/meetup-join/19%3ameeting\\_ZTA0ZDM5MWEtOGQ1Yi00MjAyLTlkMmMtNmU5YzY2ZDhmZDBl%40thread.v2/0?context=%7b%22id%22%3a%227d0726e8-bf4b-4ac1-99f1-010fb11f1d3f%22%2c%22oid%22%3a%22881101c2-2723-4c8d-838f-549d3358de6c%22%7d](https://teams.microsoft.com/l/meetup-join/19%3ameeting_ZTA0ZDM5MWEtOGQ1Yi00MjAyLTlkMmMtNmU5YzY2ZDhmZDBl%40thread.v2/0?context=%7b%22id%22%3a%227d0726e8-bf4b-4ac1-99f1-010fb11f1d3f%22%2c%22oid%22%3a%22881101c2-2723-4c8d-838f-549d3358de6c%22%7d)





## 10. Attendance of the Event Total attendee- 132

Sr. No	Name of Institution	Registration Number/ EmployeeCode	Attendee Name
1	Manipal University Jaipur	MUJ1371	DR. JEEVESH SHARMA
2	Manipal University Jaipur	MUJ1365	DR. SWATI JAIN
3	Manipal University Jaipur	220902007	DIYA BAJAJ
4	Manipal University Jaipur	220902017	SARTHAK SHARMA
5	Manipal University Jaipur	220902023	DEVANSH AGRAWAL
6	Manipal University Jaipur	220903002	NISSI WILSON
7	Manipal University Jaipur	220903004	NANDINI PUNJABI
8	Manipal University Jaipur	220903010	MOHD SHOAIB
9	Manipal University Jaipur	220903012	RAHUL BARUI
10	Manipal University Jaipur	220903018	MUKUND GAURAV SHASTRI
11	Manipal University Jaipur	220903020	SHUBHAM AGGARWAL
12	Manipal University Jaipur	220903021	MUSTANSIR KANCHWALA
13	Manipal University Jaipur	220903023	PRIYANSHI THANVI
14	Manipal University Jaipur	220903024	RASHI YADAV
15	Manipal University Jaipur	220903025	ZUBI MANIPURI
16	Manipal University Jaipur	220903026	SHRAY AGARWAL
17	Manipal University Jaipur	220903027	MRIDUL SHARMA
18	Manipal University Jaipur	220903030	SWAYAM DINESH TIBREWAL
19	Manipal University Jaipur	220903032	RAGHAV BADAYA
20	Manipal University Jaipur	220903033	SUHANI JAIN
21	Manipal University Jaipur	220903036	PUNEET VACHHANI
22	Manipal University Jaipur	220903037	RIDDHI SHARMA
23	Manipal University Jaipur	220903038	MEGHA SHARMA
24	Manipal University	220903044	SK AZHARUDDIN



# MANIPAL UNIVERSITY JAIPUR

	Jaipur		
25	Manipal University Jaipur	220903046	PRADHYUMN SINGH
26	Manipal University Jaipur	220903048	SHIVAM PALIWAL
27	Manipal University Jaipur	220903051	SIDDHI JAIN
28	Manipal University Jaipur	220903052	SARMIN NASRIN
29	Manipal University Jaipur	220903056	TANISHKA BHATIA
30	Manipal University Jaipur	220903059	TUSHAR SUREKA
31	Manipal University Jaipur	220903063	TISHA SARAF
32	Manipal University Jaipur	220903064	SOUMYA GUPTA
33	Manipal University Jaipur	220903065	PARTH
34	Manipal University Jaipur	220903068	NIDHI MEHTA
35	Manipal University Jaipur	220903069	YATHARTH KHANDELWAL
36	Manipal University Jaipur	220903070	PRAKHAR VERMA
37	Manipal University Jaipur	220903071	PRATHAM LAKHAIYAR
38	Manipal University Jaipur	220903073	SPARSH JAIN
39	Manipal University Jaipur	220903074	TUSHAR PRATAP SINGH
40	Manipal University Jaipur	220903075	VEER AGARWAL
41	Manipal University Jaipur	220903078	NIHARIKA PANDEY
42	Manipal University Jaipur	220903081	ROHIT NARAYAN
43	Manipal University Jaipur	220903086	PRATYUSH NARANIWAL
44	Manipal University Jaipur	220903096	SHREYA SAXENA
45	Manipal University Jaipur	220903099	SHREYA RASTOGI
46	Manipal University Jaipur	220903101	VANSH PHUTELA
47	Manipal University Jaipur	220903103	KHUSHI MANIYAR

  
Head  
Department of Commerce  
Manipal University Jaipur

HoD, COMMERCE