



**RV Institute of Management®**

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Approved by  
AICTE, New Delhi,  
Accredited by NAAC  
with 'A+' Grade

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**Centre for Career Development organized session on "Domain Specific on Financial Planning" by  
Dr.Purushottam Bung for 3<sup>rd</sup> semester MBA students on Date: 4<sup>th</sup> April 2024**

<b>Date: 4<sup>th</sup> April 2024</b>	<b>Venue: Seminar Hall</b>
<b>Time: 10.30 am to 1.30 pm</b>	<b>Conducted for 3<sup>rd</sup> Semester MBA students (2022-24)</b>
<b>Total Participants: 179</b>	<b>Resource Person: Dr.Purushottam Bung, Director, RVIM Event Coordinator: Prof. Payal Jindal and Prof.Pooja Ravindra T</b>

**Introduction:** Financial planning is the process of estimating financial needs of a person and implementing a comprehensive plan to meet those financial needs during his or her lifetime through investment. For instance, birth of a child, education, purchasing house, marriage, meeting emergency situations like an illness, to meet the impact of an accident, death, or natural calamities like flood, etc.

**Objectives:**

- \* Develop Financial Goals
- \* Determine Current Financial Situation
- \* Identify specific financial goals
- \* Classify goals into Short-term, Medium term or Long term
- \* Decide upon asset-allocation
- \* Choose the right investments with diversification (within asset classes)
- \* Three pillars of investment - The investment decision by an individual is influenced by **safety, liquidity and return.**

**Some of the key features taught :**

**Returns from Investment: Regular Income:**

- **Equity Investment:** You get dividend when you buy and hold equity shares of a company and units of equity mutual fund.
- **Fixed Income Investment:** In debt securities, you receive fixed interest on interest bearing investments
- \* **Capital Appreciation:** When the value of initial investment increases over a period of time and the investor benefits by selling part or whole of the investment at the increased value, it is called Capital Appreciation.

**Savings Related Products;**

**Banking:** Account Opening Process — Know Your Client (KYC) Norms

**Types of Accounts:** Basic Savings Bank Deposit Account (BSBDA), Fixed Deposit (FD) Account, Recurring Deposit (RD) Account,

**Digital Banking: Mode of Transfer and Key Features;**

- ❖ **NEFT (National Electronic Fund Transfer)**
- ❖ **RTGS (Real Time Gross Settlement)**

❖ **UPI (Unified Payment Interface)**

**Primary Market:**

When a company publicly issues new stocks and bonds for the first time, it does so in the primary market. In many cases, this takes the form of an initial public offer (IPO). SEBI examines the prospectus issued to the public for subscription of shares to see that it meets with the requirements of the SEBI Regulations. Companies issuing securities via the primary market hire merchant bankers who, on behalf of the company, prepare the prospectus and ensure related compliance for the issue of shares viz. finalization of allotment process, listing of shares in the stock exchanges, etc.

**Secondary Market:**

Secondary market is the market where securities are traded after the company has issued the stocks and bonds in the primary market. The shares are listed and traded on the stock exchanges which facilitates the buying and selling of stocks in the secondary market. Major SEBI recognized stock exchanges in India are BSE Ltd. (formerly Bombay Stock Exchange Ltd.) and the National Stock Exchange of India Ltd. (NSE).

**Insurance:**

Insurance allows individuals, businesses and other entities to protect, primarily used to manage the risk of an uncertain future loss. themselves against significant potential losses and financial hardship at a reasonably affordable cost. Insurance is a form of risk management

**Flow of the Event:** On line test conducted for all the students through google forms. Students participated enthusiastically and demanded more and more similar financial sessions. (Test Paper enclosed)

**Take away of the session:** All the students prepared financial planning summary of their own and submitted the report. (Report Enclosed)

*Payal Jindal*

**Payal Jindal**  
**Event Coordinator**  
**Centre for Career Development**

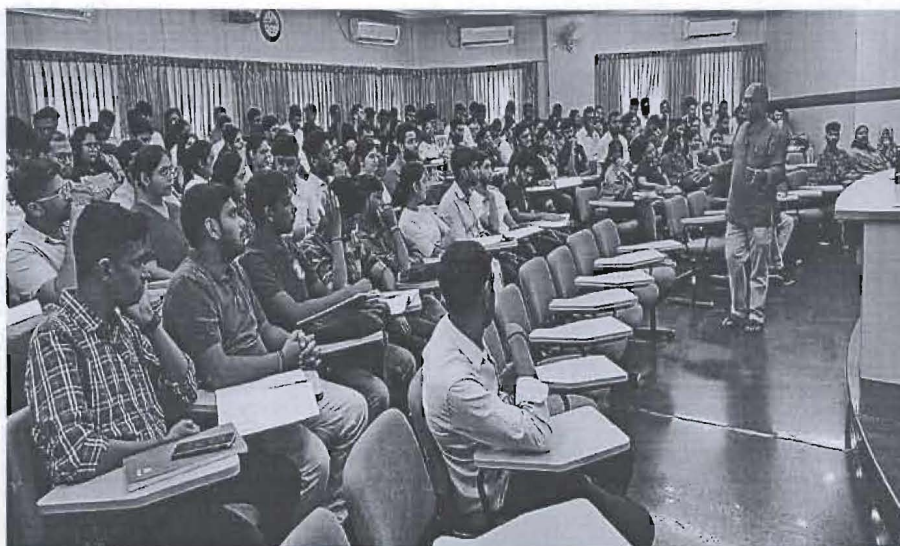
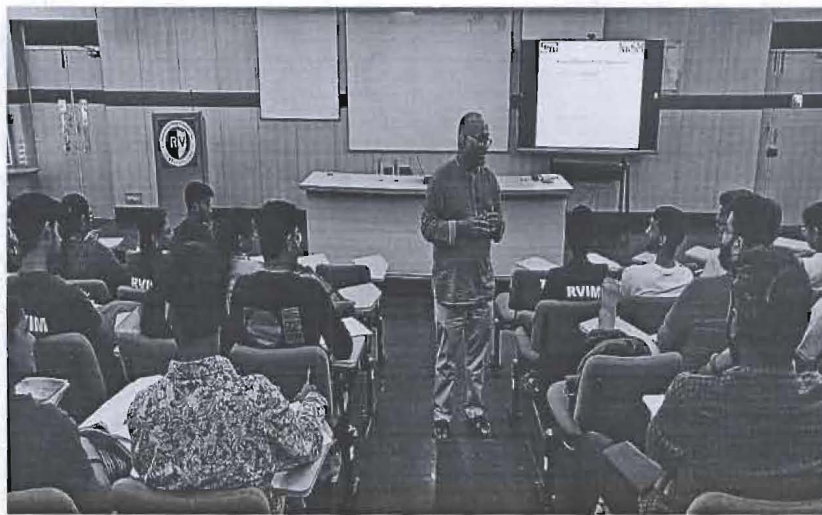


*Dr. Purushottam Bung*

**Dr. Purushottam Bung**  
**Professor and Director**  
**RVIM**



## Photo Gallery





### Financial Planning quiz scores for 2022-24

Sl.NO	Name	Total
1	AAPTHA SHETTY	48
2	Aaron Goes	42
3	Abhi Hegde	45
4	ABHILASH K	46
5	ABHINAV PRAKASH	47
6	Abhiram K N	45
7	ABHISHEK P SALAGERI	45
8	Adithya M S	45
9	Adithya P	37
10	ADITHYA S HIREMATH	50
11	ADITI B KHONA	49
12	AJAY BHASKAR HEGDE	50
13	AKASH M S	46
14	AKASHGOWDA G	44
15	AKHILA KULKARNI	46
16	AKSHATHA ANANTH SHET	46
17	Akshay Raikar	50
18	AKSHAYKUMAR HADAGALI	44
19	AMAL NATH P K	47
20	AMISHA ROHIDAS MAJALIKAR	44
21	Ankitha PR	45
22	ANUBHAV JAGANNATHA NAIK	46
23	Anushka Bhatra	46
24	Anushruth	46
25	Aradhana Hegde	46
26	ARVIND SHRINIVAS PAWAR	45
27	Ashish Manjunath	46
28	Ayisha Siddikha	45
29	AYUSHI	46
30	B J MANOJ	48
31	BHARATH	47
32	Bhargava Hebbar	45
33	BHARGAVI	50
34	BHAVISHYA	47
35	BHUVAN C WANDKAR	47
36	BIRADAR ANUPAMA BASAVARAJ	46
37	CHANDANA K R	47
38	CHETHAN K N	46
39	CHILAMACHERLA VAJRESH	44
40	Chinmayi Nayak	46
41	CHINTHAN B K	45
42	CHIRANJEEVI RAM PARANANDHI	44
43	D BHAVYA	50



44	D YOGESHWARI	47
45	Deepak Iyer	44
46	DEEPIKA K SHETTY	48
47	DEEPIKA SURESH MANJALKAR	46
48	Devi Prasad	46
49	Dhanush Anepla	47
50	DHANUSHREE K T	47
51	Dhruva Adithya	45
52	Dibya Sai	46
53	DINESH G	46
54	DUSHYANTH D	43
55	G BASAN GOUDA	47
56	G UDAYA KUMAR	50
57	GAURAV	45
58	GAUTHAM SHETTY	46
59	GIRISHA ADITYA	49
60	GUNJAN RAJU CHAUDHARI	45
61	GURU PRASAD	46
62	HARICHANDANA SRI MAREMALLA	44
63	HARSHITHA S L	46
64	HRISHIKESH	47
65	Jagpal Reddy	49
66	Jagruthi Sateesh	47
67	Jayraj SK	47
68	K S RAKSHITA	46
69	KARTHIK G BHARADWAJ	46
70	KARTHIK GAJANANA KOTEMANE	46
71	KAVITA HEMANT	49
72	KAVYA B KULKARNI	46
73	KAVYA NANDKUMAR JOGLEKAR	46
74	Keerthana NG	46
75	KEERTI BAGEWADI	49
76	KIRAN D SHIRAHATTI	45
77	KISHAN KUMAR R	46
78	Koushik Kumar	45
79	KRISTAM PREETHIKA	47
80	KRUTHIKANANDA H S	47
81	Kumar Raghavendra	46
82	LAXMIPRASAD KARNIK S	49
83	M.R.S.JAYASREE	46
84	MAHESH S HEGDE	46
85	MANOJ D	45
86	Manoranjan CM	46
87	MAYUR D NAIK	45
88	MOHAMAD MUZAMEEL SAMAD JANBAW	49
89	Mythri R	48
90	N S KARTHIKEYA	48

91	NAGBHUSHAN SURESH SHIRALIKAR	46
92	Namana	47
93	NAVEEN KUMAR G	50
94	Naveen SK	45
95	NAVEENAKUMARA K A	46
96	Navneeth	46
97	Neelappa Yalavati	38
98	Nikhil Hegde	45
99	NIKHITA VINOD KALMANE	47
100	NIKITHA RAJ N	45
101	NILANJAN R A	49
102	NITISH MALLANGOUD PATIL	47
103	PAUL ABY	45
104	PAVAN KUMAR J	44
105	Pearl Jovita	47
106	Pradyumna	49
107	PRAJNA N BHAT	48
108	PRAJNA RANI N R	47
109	PRAMOD NADAGERI	46
110	PRANAY PALATLI	48
111	Prashanta Kumar	46
112	PRAVEEN PRABHAKAR HEGDE	46
113	PRAVEEN S RAJ	46
114	Prithvi S	46
115	PRIYANKA MALLYA U	47
116	PRIYANKA. M. S	45
117	PRUTHVIRAJ GOWDA P	46
118	PUSHPA HIREGOUDAR	47
119	Rahil R	48
120	RAHUL R	49
121	RAHUL RAJENDRA JAWALI	50
122	RAJATH K.L	50
123	RAJESH	47
124	Rajkumar	50
125	RAKESH A	46
126	RAKESH DANDU	47
127	Ranjith K	44
128	RASHMI M	48
129	RESHMA V	46
130	RISHI SAGAR B K	47
131	RIYA SANJEEVA BILLAVA	46
132	ROHAN R HUNNARAGI	48
133	RUDRESH H R	45
134	S R SREE VARSHA	46
135	S VISHAL	48
136	Sachin Gowda	45
137	Sahana Patil	46

138	Sai Ganesh	47
139	SAJJAN S GOWDA	47
140	Sana Ur Rahman	45
141	SANJAN C S	49
142	SANJAYA M	48
143	SANTHOSH J	50
144	SATHVIK NARASIMHA SHASTRI	47
145	Satyaki Adak	47
146	Shamanth U	47
147	SHARANYA	48
148	SHARATH M N	47
149	SHASHANK A SHETTY	46
150	SHASHANK KALLESH CHOWDRY K S	50
151	Shashwath BP	48
152	Shashwath Shetty	47
153	SHREYA NAGESH	44
154	SOUJANYA INAMDAR	43
155	SOWJANYA N M	47
156	SRISHTI JOSHI	46
157	Srujan Raj	47
158	SUHAS K S	46
159	SUMANTH KOUSHIK B V	50
160	SUMUKHA H C	50
161	SUPRITI PRAKASH	42
162	SURE SAI NITHYUSHA	46
163	SURYA K	48
164	SUSHMITHA	49
165	SUSMITHA M JOIS	50
166	Swathi CD	47
167	TEJAS.C	47
168	Tejaswi	48
169	THARUN MADHAV G P	46
170	VAISHNAVI N NAIDU	47
171	VARUN N	47
172	venu KUMARI G M	47
173	VIBHA SHANKARNARAYAN BHAT	49
174	VIKRAM BORKAR	45
175	VINAY KUMAR	46
176	VINITH N SHETTY	49
177	Vishal Veerabhadranavar	47
178	Yogesh R	46

