



PRESIDENCY COLLEGE

(AUTONOMOUS)

AFFILIATED TO BENGALURU CITY UNIVERSITY, APPROVED BY AICTE, DELHI & RECOGNISED BY THE GOVT. OF KARNATAKA

RE-ACCREDITED BY NAAC WITH 'A+' GRADE

BRIEF REPORT ABOUT THE GUEST LECTURE DATED 18.5.22

TOPIC: Recent Trends in Investment Planning

TIME: 10:00 to 10:50 A.M

DATE: 18-05-22

TARGET AUDIENCE: VI BBA A, B, C and D

Number of Students participated: 177

Speaker – By Babu Arunachalam is a Founder, VS Financial Services Total 30 Years+ Diversified Experience spanning banking, project management and the last 20 Years in Personal Finance/Training, including reaching out to school children. He is also a CAIIB (Certified Associate Of the Indian Institute of Bankers) Code of Conduct for Intermediaries of Mutual Funds. He is also an AMFI (Association of Mutual Funds In India) Registered Mutual Fund Distributor since 2003

ABOUT THE EVENT:

The Guest lecture session took place with welcoming speech made by Dr. Poornima Karthikeyan, Guest lecture co-coordinator with brief reading of the speaker profile. Later the guest lecture was deliberated by the speaker for about 50 minutes in online. He has covered the topic on **Recent Trends in Investment Planning**. He clearly explained about the milestone journey of goal based Investing. He also explained about need of money and optimizes money management. And also about real wealth which is quality time to you and your family and which can contribute significantly to all round happiness and prosperity. He gave insight knowledge about seven Reasons why one must learn Personal Finance. As the audience is Final year students he told about the formula to create about Wealth Creation. He also explained about journey of goal based Investing and its importance. He clearly explained about different yojnas where central government created to develop thrift among public they are Pradhan Mantri Jan Dhan Yojana, Pradhan Mantri Mudra Yojana, Ayushman Bharat Arogya Karnataka Scheme,



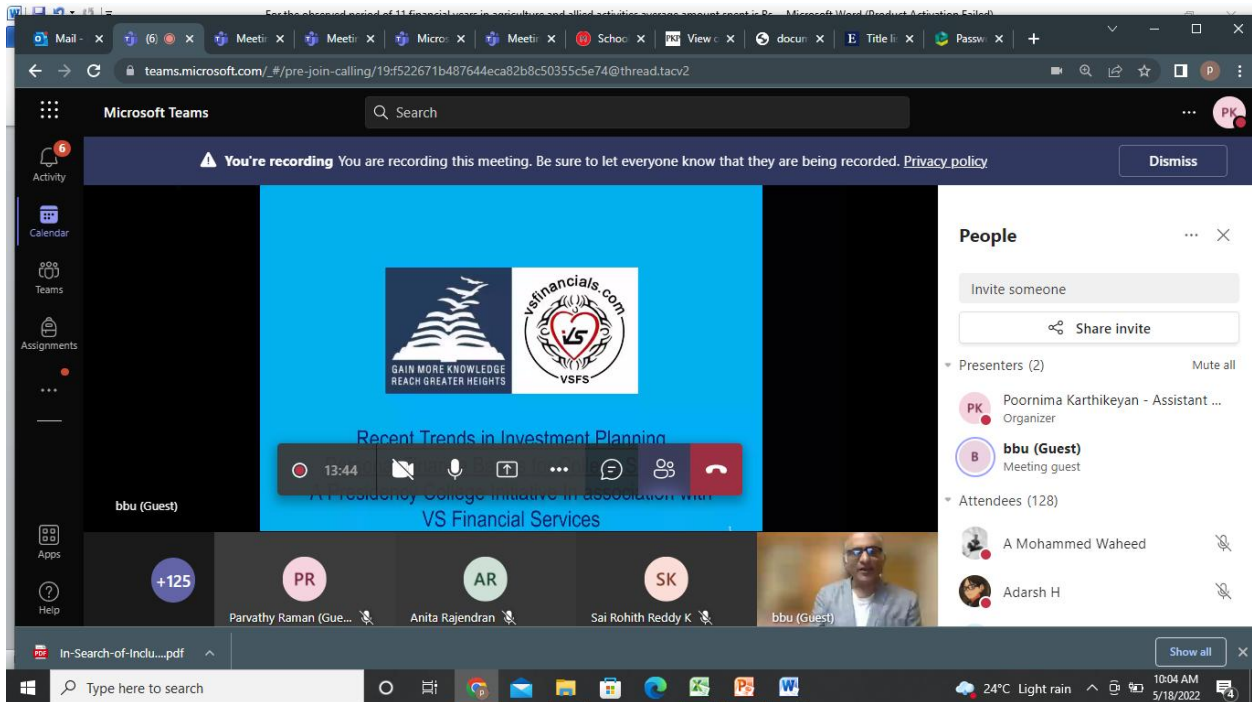
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Pradhan Mantri Jeevan Jyoti Bima Yojana, Pradhan Mantri Suraksha Bima Yojana and also deep Knowledge about Atal Pension Yojana. He closed the session with Busting Myths on Investing. There were 177 participants for the session.

Dr. Poornima Karthikeyan
Associate Professor,
Commerce and Management Department
Presidency College, Bangalore.





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The screenshot shows a Microsoft Teams meeting interface. The main content is a presentation slide titled "The Milestone Journey Of Goal-based Investing" by Franklin Templeton. The slide features a flowchart with the following steps: "What are the DREAMS you wish to achieve in the journey of life?" leading to "Create a BUDGET", then "Assess your Risk Profile And tolerance", "QUANTIFY goals based on priority", "Work out and implement a GOAL BASED plan with goal specific asset allocation", and finally "Regularly REVIEW and adjust your GOAL". A "GOAL" icon is also present. The meeting controls at the bottom show a timer at 23:39 and participants: Parvathy Raman (Gue...), Anita Rajendran, Sai Rohith Reddy K, and bbu (Guest). The right-hand panel shows the "People" list with 167 attendees and a "Share invite" button.

The screenshot shows a Microsoft Teams meeting interface. The main content is a presentation slide titled "Benefits under PMJDY" (Pradhan Mantri Jan Dhan Yojana). The slide includes the PMJDY logo and a list of benefits: a. One basic savings bank account is opened for unbanked person. b. There is no requirement to maintain any minimum balance in PMJDY accounts. c. Interest is earned on the deposit in PMJDY accounts. d. Rupay Debit card is provided to PMJDY account holder. e. Accident Insurance Cover of Rs.1 lakh (enhanced to Rs. 2 lakh to new PMJDY accounts opened after 28.8.2018) is available with RuPay card issued to the PMJDY account holders. f. An overdraft (OD) facility up to Rs. 10,000 to eligible account holders is available. g. PMJDY accounts are eligible for Direct Benefit Transfer (DBT), Pradhan Mantri Jeevan Jyoti Bima Yojana (PMJJBY), Pradhan Mantri Suraksha Bima Yojana (PMSBY), Atal Pension Yojana (APY), Micro Units. The meeting controls at the bottom show a timer at 36:20 and participants: Sai Rohith Reddy K, Anita Rajendran, Hari Narayana Upad..., and bbu (Guest). The right-hand panel shows the "People" list with 165 attendees and a "Share invite" button.