

# SWS Financial Literacy Club

From Financial Literacy to Financial Freedom



## News Letter

August 2018

### Activity #1: 8 August 2018 Session 1 @ KBTCOE

The inauguration took place at the hands of Dr. K. S. Holkar (Principal), Mr. Raghuvir Adhikari (CEO, SWS FSPL, Nashik), Mr. Aditya Hingne (Chief Manager, Sales, HDFC Asset Management Company, Nashik), Mrs. Rupali Kulkarni (Training Head, SWS FSPL, Nashik) and Dr. D. T. Khairnar (HoD, MBA). In welcome speech, Dr. D. T. Khairnar gave introduction of the department and elaborated on the activities to be carried out under this MoU. Mr. Aditya expressed his views on theme of Financial Literacy Club. Dr. K. S. Holkar (Principal) motivated students for the active participation in the Literacy Club and activities to be carried out under this MoU. Mrs. Rupali Kulkarni explained the needs, benefits and opportunities for the students through Financial Literacy Club. Mr. Raghuvir Adhikari highlighted Financial Advisory as a career option. The students and staff of the MBA Department took the benefit of the session.



**Activity #2: 23 August 2018 Session 2 @ KBTCOE**

IDFC Branch Head, Nasik Mr. Jayesh Chudiwal explained the concept of “Financial Freedom” through show of one idiot movie. The Students demanded the session on SIP in post movie interaction.



**Activity #3: 25 August 2018 Session 1 @ IMRT**

The Club was inaugurated at the hands of Mr. Rupesh Wagh. LIC, MF. Mrs. Rupali Kulkarni explained the needs, benefits and opportunities for the students through Financial Literacy Club. Mr. Raghuvir Adhikari highlighted need of Financial Literacy.



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## News Letter

September 2018

### Activity #4: 11 Sept. 2018 Session 3 @ KBTCOE

Mr. Rupesh Wagh (Branch Manager, LIC Mutual Fund, Nashik) was invited as resource person. Mr. Rupesh guided the audience regarding available investment option such as Gold, Real Estate, FDs, Stock Market, Mutual Fund etc. He also demonstrated the asset growth through these investment options. Thus he proved the growth in Mutual Fund is greater than any other available investment option. He also focused on the benefits of Mutual Fund investment such as simplicity, lower cost, diversification and professional management, thus making Mutual Fund as first and the best investment choice for the common people.



### Activity #5: 19 Sept. 2018 Session 1 @ KKW

The Club was inaugurated at the hands of Mr. Sandeep Kulkarni, HDFC Ltd. Mrs. Rupali Kulkarni explained the needs, benefits and opportunities for the students through Financial Literacy Club. Mr. Raghuvir Adhikari highlighted need of Financial Literacy.





### Activity #6: 26 Sept. 2018 Session 1 @ Dr. Moonje Institute of Management

The Club was inaugurated at the hands of Mr. Ravi Parate, UTI MF. Mrs. Rupali Kulkarni explained the needs, benefits and opportunities for the students through Financial Literacy Club. Mr. Raghuvir Adhikari highlighted need of Financial Literacy. Mrs. Vidya Phadake from Gharkul motivated students for the Social Financial Drive for Gharkul.



### Activity #7: 27 Sept. 2018 Session @ SWS

Mr. Eric Hon, iFast Financials, Singapore interacted with the students on the topic "Financial Advisory: A Career Option". The importance of advisory in upcoming future was highlighted by Mr. Hon. Students and faculty members from KKW COE and KBT COE attended and took the benefits from the session.



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## News Letter

October 2018

The highlights of this month are that the SWS Financial Literacy Club, has been inaugurated at TWO different locations, other than NASIK. One is Dr. Ambedkar Institute of Management Studies and Research **NAGPUR** and other is G. S. College of Commerce, **WARDHA** ! With the noble mission of "From Financial Awareness to Financial Freedom", this literacy club is spreading its wing in the wider geographical areas.

## Report of the Month Follows.

### Activity #8: 1 Oct 2018. Session 4 @ KBT COE, Nasik

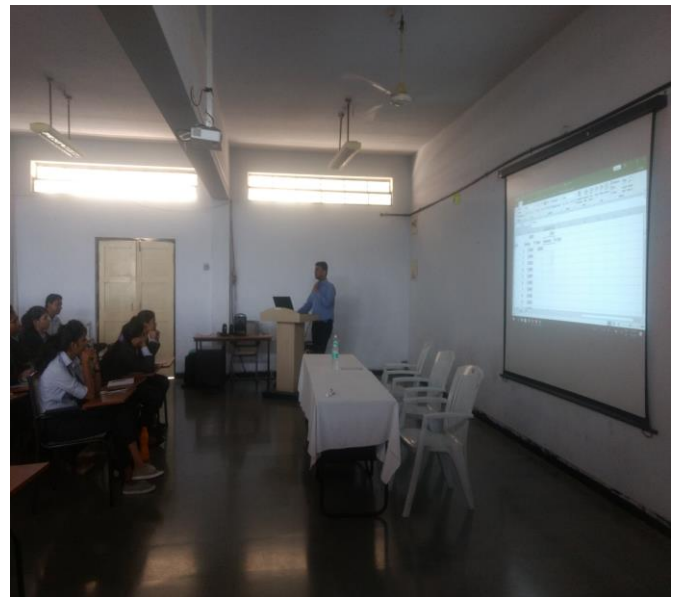
Mr. R. P. Adhikari, Ms. Rupali Kulkarni conducted a "Quiz Competition" on the theme of Mutual Funds, Equity and Finance. Mr. R. P. Adhikari was in role of "Expert" to enhance the theme behind the questions and Ms. Rupali Kulkarni was in role of "Quiz Master". There were rounds like visual, short answers, rapid fire and numerical solving. Students enjoyed through the "Learn Through Fun" concept. Upgrading the knowledge, self-realization, mock-interview were the motives behind this quiz. Winners and the participants from the audience were appreciated through prizes.



**Activity #9: 3 Oct 2018. 2018 Session 2 @ KKWIEER, Nasik**

The concepts of "Financial Freedom", importance of "Start Early" and "Power of Compounding" were demonstrated through show of one idiot movie. The interaction with the students, post session went very well with the assertion that students were aligned to the message given by the movie. Mr. Deepak Kulkarni, M.D., SWSFSPL, Nasik, practically demonstrated the concepts through taking an example and demonstrating the same through MS Excel. The students other than Management discipline attended the session and demanded such activity for them.

Mr. Bhavesh Gopalani from F.Y. M.B.A. , the student member of the club, created a brief concise report on this session which explored the "takeaways" from the movie, for the students.





**Activity #10: 6 Oct 2018. Session 1 @ JDC Bytco IMSR, Nashik**

The Financial Literacy club was inaugurated at JDC Bytco IMSR at the hands of Prof. Shishir Sindekar, Prof. BYK College of Commerce and Director of the institute Mrs. Sarita Aaurangabadkar. Mrs. R. D Kulkarni explored the need of Financial Literacy for every one and detailed the benefits of club activities. Mr. Mukul Joshi was elected as president and Mrs. Urmila Patel was elected as Secretary of the club.



**Activity #11: 9 Oct 2018. Session 2 @ Dr. Moonje Institute of Management, Nasik**

This time it was the conduction of the show of IDFC's "One Idiot" movie. The theme of this movie is "Money and Youngsters". It highlights the concepts of "Financial Freedom", importance of "Start Early" and "Power of Compounding". With the help of a SIP calculator, Mrs. Rupali Kulkarni, Training Head, SWSFSPL, practically demonstrated the concepts. The interaction with the students, post session went very well with the assertion that students were allied to the message given by the movie.





**Activity #12: 10 Oct 2018. Session 1 @ Dr. Ambedkar IMSR, Nagpur**

The Financial Literacy club was inaugurated at Dr. Ambedkar IMSR, Nagpur at the hands of Mr. Erik Hon, iFast Financials and Mr. Mahesh Kumar Nanda, HDFC AMC. Mr. Erik conducted a session on "Career Opportunities in Financial Advisory" and Mr. R. P. Adhikari, CEO, SWSFSPL conducted a session on "Need of Financial Literacy".



**Activity #13: 11 Oct 2018. Session 2 @ G. S. College, Wardha**

The Financial Literacy club was inaugurated at G. S. College, Wardha at the hands of Mr. R. P. Adhikari, CEO, SWSFSPL, Nasik. Mr. Adhikari conducted a session on “Need of Financial Literacy” and answered the queries of the audience during the post session interaction.



**Activity #14: 11 Oct 2018. Session 2 @ JDC Bytco Institute of Management, Nasik**

Through the show of one idiot movie, the concepts of “Financial Freedom”, importance of “Start Early” and “Power of Compounding” were demonstrated. Mr. Deepak Kulkarni, Managing Director, SWSFSPL, Nasik, demonstrated the concepts through an example in MS Excel which made students to interact and understand the concepts. The students were found curious about the magical returns that the SIPs produce.

Mr. Mukul Joshi, a FYMBA student wrote a concise report after the event which explored the “takeaways” for the students, from this session.



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## News Letter

Jan 2019

### Activity #15: 19 Jan 2019. Session 3 @ JDC Bytco Institute of Management, Nasik

The quiz on the theme of Finance and Banking was conducted for the students of FLC at JDC Bytco IMSR, Nasik. The goals behind conducting such quiz were: 1) testing whether students possess the general knowledge of the field, 2) testing whether they are ready for the interview, 3) realizing the level of knowledge the students possess about the current financial affairs etc. Mr. R. P. Adhikari played the role of Filed Expert and Ms. R. D. Kulkarni was quiz master. Mr. Veer and Mr. Atharva from Team SWS assisted in quiz conduction. Mr. Mukul Joshi from the department presented a short report on the "Takeaways" from the session. The students enjoyed this session and appreciated the "Knowledge Updates" they received.





### Activity #16: 21 Jan 2019. Session 3 @ KKWIEER, Nasik

The quiz on the theme of Finance and Banking was conducted for the students of FLC at KKWIEER, Naik. This quiz comprised rounds like identifying the prominent personality from the field, short answers, rapid fire question and numerical round. Mr. R. P. Adhikari played the role of Filed Expert and Ms. R. D. Kulkarni was quiz master. Mr. Veer and Mr. Atharva from Team SWS assisted in quiz conduction. The students enjoyed this session and appreciated the “Knowledge Updates” they received.

The goals behind conducting such quiz were: 1) testing whether students possess the general knowledge of the field, 2) testing whether they are ready for the interview, 3) realizing the level of knowledge the students possess about the current financial affairs etc.



**Activity #17: 29 Jan 2019. Session 5 @ KBTCOE, Nasik**

A session on "Financial Planning and Portfolio Management" was conducted by Ms. R. D. Kulkarni and Mr. R. P. Adhikari. Ms. Kulkarni explained the need of financial planning and the process related to it. Mr. Adhikari elaborated the concept of Portfolio Management and the process of wealth creation through it. Portfolio management example was also discussed.



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## News Letter

Feb 2019

### Activity #18: 1 Feb 2019. Session 4 @ JDC Bytco IMSR, Nasik

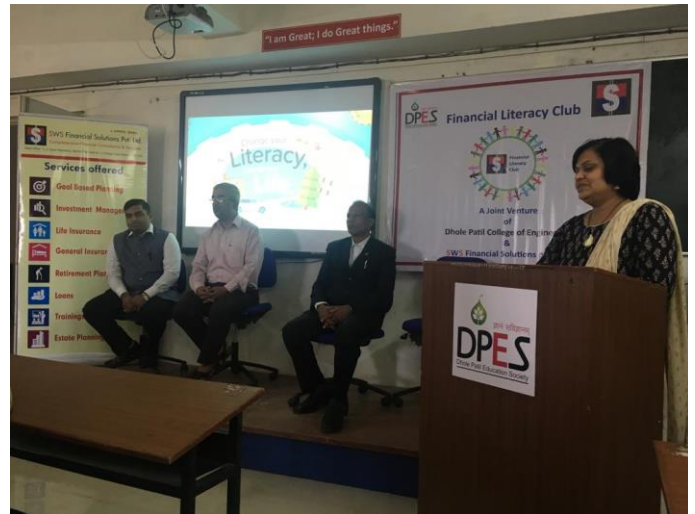
The session topic was "Financial Planning and Portfolio Management". The topics of the discussion were: Need of Financial Planning, Steps in this, Role of Financial Planner, Portfolio Management techniques. The financial planning part was conducted by Ms. Rupali Kulkarni and Mr. R. P, Adhikari explored the concept of Portfolio Management. He also took sample examples. The student interaction post session reflected their interest and understanding.





**Activity #19: 2 Feb 2019. Session 1 @ Dhole Patil College , Wagholi, Pune**

The Financial Literacy club was inaugurated at the hands of Prof. Dr. Nihar Walimbe, Principal of the institute. Mr. R. P. Adhikari explored the need of Financial Literacy for every one and detailed the benefits of club activities. Mr. Prateek Shende was elected as president and Ms. Shivani Bhole was elected as Secretary of the club.



**Activity #20 4 Feb 2019. Session 1 @ Z. B. Patil College , Dhule**

The Financial Literacy club was inaugurated at the hands of vice principal Prof. Vidya Patil , Vice-Principal of the institute. Mr. R. P. Adhikari explored the need of Financial Literacy for every one and detailed the benefits of club activities. Mr. Narendra Dhodapkar was elected as president and Ms. Prajkta Gandhi was elected as Secretary of the club.



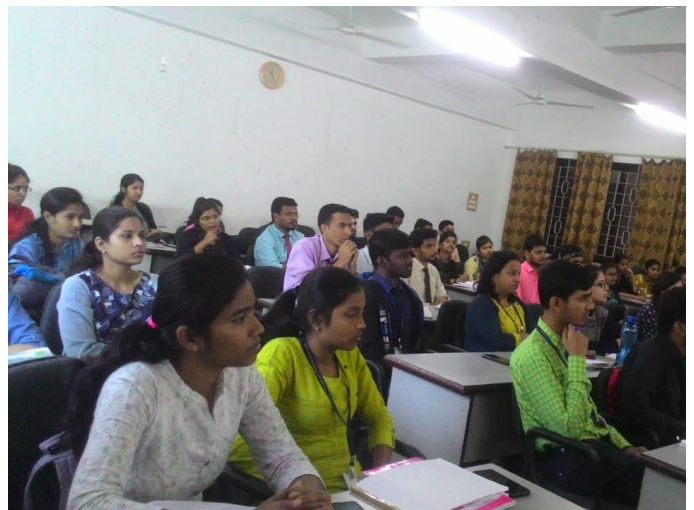
**Activity #21: 6 Feb 2019. Session 4 @ KKWIEER, Nasik**

The session topic was "Financial Planning". The topics of the discussion were: Need of Financial Planning, Steps in this, Role of Financial Planner, Portfolio Management techniques. The financial planning part was conducted by Ms. Rupali Kulkarni and Mr. R. P, Adhikari explored the concept of Portfolio Management. He also took sample examples. The student interaction post session reflected their interest and understanding.



**Activity #22: 9 Feb 2019. Session 2 @ Dr. Ambedkar IMSR, Nagpur**

The session topic was "Mutual Funds and Taxation". Mrs. Rashmee Neeraj Adbe was the resource person for this session. The edge on Mutual Funds from taxation angle over traditional avenues of Investments was analyzed and explained to the students through examples.





**Activity #23: 19 Feb 2019. Session 2 @ DPCOE, Pune**

The concepts of "Financial Freedom", importance of "Start Early" and "Power of Compounding" were demonstrated through show of one idiot movie. The interaction with the students, post session went very well with the assertion that students were aligned to the message given by the movie. Mr. Vivek Ohol at SWS-Pune Branch interacted with the students.





**Activity #24-25: 23 Feb 2019. Session 2,3 @ Z.B. Patil College, Dhule**

Mr. Vijay Deore, associate at SWS initiated this session on the show of one idiot movie. The concepts of “Financial Freedom”, importance of “Start Early” and “Power of Compounding” were demonstrated through movie and post-show interaction. The faculty members also appreciated the show and hence separate session of the same movie was also conducted for the group of faculties.



**Activity #26: 25 Feb 2019. Session For members of Financial Literacy clubs in Nasik@ Roasaheb Thorat Hall, Gangpaur Road, Nasik.**

Mr. Rohitkumar Mishra, a renowned trainer in this field conducted a session on topic “From Pocket Monet to Money-Pocket”. He explored on topics like good-bad assets and good-bad liabilities to highlight the concept. Post session, interaction with students went very well in which queries raised by the students were resolved by Mr. Mishra.



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## News Letter

Mar 2019

### Activity #27: 6 Mar 2019 : Inter Financial Literacy Clubs Quiz Mania Competition

Total 8 teams participated in this. These were from three colleges including KKWIEER, KBT COE, JDC Bytco IMSR college, Nasik. A written test was conducted to filter out final four teams for Quiz competition. The quiz incorporated four rounds like short answer, rapid fire, long forms, person's significant work. The teams along with the audience enjoyed these rounds.

The first and second, both prizes were bagged by the teams from JDC Bytco IMSR college.



### **Activity #28: 7 Mar 2019 : Inter Financial Literacy Clubs Sharp Shooter Competition**

Total 2 teams participated in this. These were from colleges including KBT COE and JDC Bytco IMSR college, Nasik. The theme given for this competition was “SWS in Financial Advisory”. Remarkable efforts were done from a team of Ajaysingh Dhawalia from KBT COE. A nice video clip including these efforts was presented.

### **Activity #29: 8 Mar 2019 : Inter Financial Literacy Clubs Social Drive Competition**

A team from KBT COE and JDC Bytco IMSR college, Nasik. The theme given for this competition was “Financial Literacy Drive”. Priyanka Suryawanshi and team from KBT COE exhibited remarkable performance . The team deeded work in villages like Kalvan, Sakore, Bhendi and worked for farmers in these villages where they explained the schemes like PMJJBY, PMSBY, APY etc. to the farmers. Importance of keeping proper records of their financial transactions, savings in bank accounts etc. were highlighted by the students. A nice video clip including these efforts was presented.





**Activity #30: 20 Mar 2019 : Session 6 @ KBT COE, Nasik**

The concluding session for the year was conducted. An IDFC movie “One Idiot Returns” was shown to the students. The aim behind this movie show was to ignite in them importance of savings, retirement planning. An appeal was made to the F.Y. students to dig into their Summer-Internship topic during this movie show. Also, a discussion on refinement of FLC activities, opportunities to the passing out students to work with SWS were elaborated.

