

‘Workshop on Fundamentals of Investments’ by Prof. Rupesh Parthe

Passionate about Financial Planning and Investments

18th October 2020

In workshop, the invited speaker Prof. Rupesh Parthe, shared his knowledge and experience about Financial Planning, savings, and Investments. Financial Planning is the process of framing financial policies in relation to procurement, investments, and administration of funds. The aim of Financial planning is to determine capital requirement and determine capital structure.

Investments: Introduction

“Do not save what is left after spending but spend what is left after saving” When 7th wealthiest person in the world talks about savings, it makes sense to listen.

The aim of workshop titled “Fundamentals of Investments” is to create awareness in Millennials about savings and to educate them with basic knowledge of financial planning. At the beginning Prof. Rupesh Parthe explained basic definition of savings and Investments. Savings is a parking of hard cash in extremely safe and liquid security whereas Investments is putting money to create wealth.

Prof. Rupesh Parthe further explained Active and Passive Income. Active income is money earned in exchange of performing a service. Passive income is money earned on an investment or work completed in the past that continues to make money without additional effort.

Prof. Rupesh Parthe explained 4 tangible and Intangible Asset class i.e. Real Estate, Gold/Silver, Mutual Funds and Stock Market. Prof. Rupesh Parthe explained various methods/ways to select a stock and shared his experience in building a portfolio.

Key Takeaways

Prof. Rupesh Parthe gave very informative session on Fundamentals of Investments. The speaker started workshop from scratch explaining basic terms like savings and investments. The speaker explained 4 different asset class in detail. The speaker gave insights of how to maintain portfolio by distributing stocks among various industries. The workshop concluded with Question and answer session. The speaker gave very important tips on saving and investments. Overall, it was very informative workshop where participants got basic understanding of financial planning from speaker.