



**Sandip University**  
**School of Commerce & Management Studies**

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**“Mutual Fund Awareness Program in Nashik”**

by

**HSBC BANK**

**NASHIK on 07.02.2025**

**Conducted by:**

**MR. RUPESH WAGH (BRANCH MANAGER)**

**About the Mutual Fund Awareness Program:**

The **Mutual Fund Awareness Program** is designed to educate individuals about **investment strategies, financial planning, and risk management**. The program aims to empower investors with the knowledge required to make informed decisions regarding mutual fund investments.

**Objectives of the Mutual Fund Awareness Program:**

The primary objectives of the program include:

- ✓ Educating participants about the basics of mutual funds and their types.
- ✓ Explaining the benefits of mutual fund investments, including diversification and professional management.
- ✓ Providing insights into risk assessment, market trends, and long-term wealth creation.
- ✓ Encouraging responsible financial planning and goal-based investing.
- ✓ Addressing common myths and misconceptions related to mutual funds.

**The Activities Carried under the Mutual Fund Awareness Program:**

Key Highlights of the Visit: The program included various interactive sessions, such as:

- ✦ **Expert Lecture:** A detailed presentation by a financial expert on the fundamentals of mutual funds.
- ✦ **Q&A Session:** Participants had the opportunity to clarify their doubts with industry professionals.
- ✦ **Case Studies:** Real-life investment scenarios were discussed to provide practical insights.
- ✦ **Investment Simulation:** A hands-on activity where participants simulated investing in different mutual funds..

**Outcome of the Mutual Fund Awareness Program:**



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**Learning Outcomes:**

- Increased awareness about mutual fund investments and financial planning.
- 1) Better understanding of **Systematic Investment Plans (SIPs)** and **Lump Sum investments**.
  - 2) Enhanced confidence among investors in making informed decisions.
  - 3) More people considering mutual funds as a viable long-term investment option.
- Reduction in common investment mistakes due to better knowledge. Practical knowledge of trading, investment strategies, and risk management.

**Conclusion:** The industrial visit to NISM Patanganga was an enriching experience for MBA Finance students, providing valuable exposure to the real-world dynamics of financial markets. The visit not only supplemented their academic knowledge but also inspired them to explore careers in the financial services industry.

**Some of the Mutual Fund Awareness Program photographs of the are attached**

