



Sandip University
School of Commerce & Management Studies

“Webinar on How to invest in bonds and pitfalls to avoid ”

by

**MBA Finance students under the
School of Commerce and Management Studies**

on 12.03.2025

Conducted by:

Dr. Shilpi Agarwal, Professor, SOCMS

About the Webinar:

The webinar "**How to Invest in Bonds and Pitfalls to Avoid**" was an insightful session aimed at educating investors about bond investments. Led by **Vishal Goenka**, the webinar covered fundamental concepts of bonds, their benefits, risk factors, and strategies for maximizing returns while avoiding common mistakes.

Objectives of the Webinar:

- To educate investors on the fundamentals of bond investments.
- To explain different types of bonds and their role in a diversified portfolio.
- To highlight the risks associated with bond investments and how to mitigate them.
- To provide insights into interest rate trends and their impact on bond markets.
- To discuss common pitfalls that investors should avoid.
- To introduce investment strategies that optimize bond returns while minimizing risks.
- To engage participants in an interactive Q&A session to address their queries.

The Activities Carried in webinar:

Key Highlights of the Webinar:

1. Opening Remarks and Introduction

- Welcome speech by the host.
- Introduction of the speaker, Vishal Goenka.

2. Presentation on Bond Investments

- Detailed explanation of bonds and their types.
- Discussion on the importance of bonds in an investment portfolio.



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3. Interactive Polls and Live Questions

- Participants engaged in live polls on investment preferences.
- Real-time Q&A sessions were conducted for better engagement.

4. Case Studies and Real-World Examples

- Analysis of bond market trends using past data.
- Examples of successful and failed bond investments.

5. Discussion on Common Pitfalls

- Highlighting common mistakes investors make in bond markets.
- Providing strategies to mitigate risks.

6. Q&A Session

Outcome of the “Webinar”:

Learning Outcomes:

- Participants gained a comprehensive understanding of bond investments and their role in wealth management.
- Improved awareness of risks and strategies to mitigate them when investing in bonds.
- Attendees learned how to analyze bond markets and make informed investment decisions.
- Enhanced ability to avoid common investment mistakes and adopt best practices in fixed-income investing.
- Increased engagement and networking among investors and financial professionals.
- Encouragement for further exploration of advanced bond investment strategies and financial planning.



Conclusion: The webinar successfully enhanced participants' understanding of bond investments and the associated risks. It provided actionable insights for making informed investment decisions while avoiding common mistakes. Attendees left with a better grasp of how to construct a balanced investment portfolio that includes bonds.


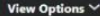


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Some of the photographs of the Webinar are attached





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Listed vs Unlisted

	Listed Debt Securities	Un-Listed Debt Securities
 Regulations	<ul style="list-style-type: none">Securities and Exchange Board of India (SEBI) (Issue and Listing of Non-Convertible Securities), Regulations 2021Companies Act, 2013	Companies Act, 2013
 Listing	Listed on Recognized Stock Exchange like BSE/NSE. Mandatory prior approval from the designated Stock Exchange before issuance.	Not Listed on stock exchange No approval required from stock exchange
 Liquidity	More Liquid Tradable through Exchange, RFQ and Over-the-counter (OTC) market.	Less Liquid Tradable through over-the-counter (OTC) market only.
 Penalty Applicability	1% additional interest for delay in listing 2% additional interest for delay in security creation	Not Applicable
 Disclosures to Exchanges	Disclosure of, Financials, Corporate Governance Report, End Use of Funds etc.	Not Applicable as it is not Governed by SEBI regulations, Voluntary

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Mr. Kapil Shrivastava

Mr. Vishal Goenka



 **GPS Map Camera**



Mahiravni, Maharashtra, India
Xm89+px4, Mahiravni, Maharashtra 422213, India
Lat 19.967042° Long 73.669696°
12/03/2025 04:19 PM GMT +05:30



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Zoom Workplace | IndiaBonds | Pitfalls to Avoid

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Below are the **RED Flags** to look for:

- 1. Unregulated Platforms**
Caution: Avoid investing through unregulated platforms, as they offer no investor protection nor regulatory disclosures.
- 2. Unlisted Bonds**
Risk Alert: Refrain from purchasing unlisted bonds, as they are unregulated and may not provide adequate financial disclosure.
- 3. High-Yield Bonds**
Investment Advice: Be cautious of bonds offering yields exceeding 15%. Such high returns often reflect underlying credit risks. Unless you are a seasoned credit specialist, it is advisable to approach these investments with caution.
- 4. Structured Bonds**
Complexity Warning: Before investing in structured bonds, ensure you fully understand the underlying mechanisms, including pooling, tranching, and securitization. These products can be complex and may not suit all investors.

Illustration: A man looking at a smartphone displaying a bar chart with a red line and a large 'ALERT!' sign.

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Key Risks

- Liquidity risk
- Fraud risk
- Market risk
- Credit risk

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Mr. Kapil Shimal

Mr. Vishal Goenka