

## **A Report on the Workshop on Financial Wisdom through Financial Instruments**

Resource Person: **Mr. Veera Bramha Rao Arekapudi**, Sr.Consultant, AMFI, Former General Manager, State Bank of India, Ex-CEO, Trust Exchange Company, Doha, Qatar

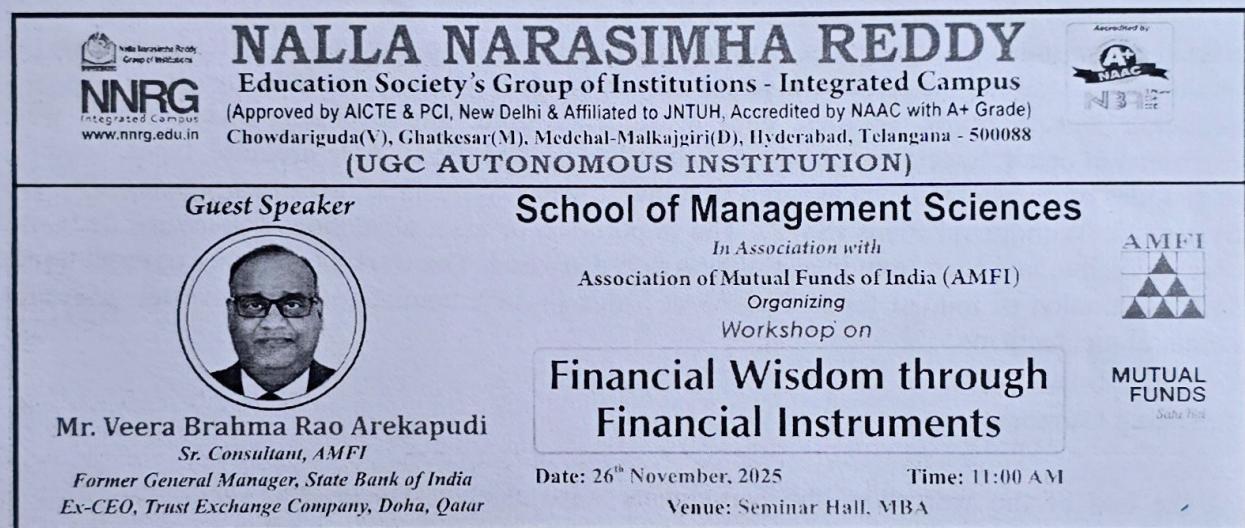
**DATE: 26-11-2025**

**TIME: 11AM**

**VENUE: MBA Seminar Hall, Second Floor**

**PARTICIPANTS TYPE:** Students of MBA I YEAR ISEM & II YEAR I SEM

**NO OF PARTICIPANTS: 100**



**NALLA NARASIMHA REDDY**  
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Chowdariguda(V), Ghatkesar(M), Medchal-Malkajgiri(D), Hyderabad, Telangana - 500088  
(UGC AUTONOMOUS INSTITUTION)

**Guest Speaker**  
  
**Mr. Veera Bramha Rao Arekapudi**  
Sr. Consultant, AMFI  
Former General Manager, State Bank of India  
Ex-CEO, Trust Exchange Company, Doha, Qatar

**School of Management Sciences**  
In Association with  
Association of Mutual Funds of India (AMFI)  
Organizing  
Workshop on

**Financial Wisdom through  
Financial Instruments**

Date: 26<sup>th</sup> November, 2025      Time: 11:00 AM  
Venue: Seminar Hall, MBA

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**MUTUAL FUNDS**  
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The School of Management Sciences organized a workshop titled “Financial Wisdom through Financial Instruments” with the objective of enhancing financial awareness among students. The program commenced with a warm welcome to the gathering by Dr.T.Ravindra Reddy -Dean, School of Management Sciences. In the welcome address, the Dean emphasized the importance of financial literacy in today’s dynamic economic environment and encouraged students to develop informed and disciplined financial habits for long-term financial well-being.

## **Introduction:**

The workshop was designed to provide participants with practical knowledge of financial planning and various financial instruments available for investment. In the present era of inflation and changing financial markets, understanding the transition from mere saving to systematic investing has become essential. The session focused on developing financial wisdom by familiarizing students with concepts such as financial planning, asset allocation, mutual funds, and goal-based investing.

## **Objectives of the Program:**

The key objectives of the workshop were:

- To create awareness about the importance of financial planning and investing.
- To help participants understand the impact of inflation on savings.
- To introduce various financial instruments such as equity, debt, hybrid investments, and mutual funds. To encourage goal-based and systematic investing habits among students.
- To develop the ability to make informed financial decisions.

## **Summary of Learning:**

During the workshop, participants gained insights into the concept of financial planning and its role in achieving life-stage goals. The session highlighted the limitations of traditional saving methods and stressed the need to invest wisely to combat inflation. Various investment options, including mutual funds, equities, debt instruments, gold, and exchange-traded funds, were explained in detail. Special emphasis was placed on mutual funds, their structure, types, benefits, and modes of investment such as lump sum investments, Systematic Investment Plans (SIP), and Systematic Withdrawal Plans (SWP). The importance of asset allocation, risk-return trade-off, diversification, and long-term investing was also discussed. The workshop further covered topics such as taxation of mutual funds, Net Asset Value (NAV), nomination, and investor grievance redressal mechanisms.

## **Learning Outcomes:**

At the end of the workshop, the participants were able to: Understand the significance of financial planning and disciplined investing. Identify different financial instruments and their risk-return characteristics. Recognize the benefits of mutual fund investments and systematic investment plans. Apply the concept of asset allocation according to financial goals and risk appetite. Develop awareness about taxation, nomination, and investor protection mechanisms.

## **Valedictory Session:**

The valedictory session was delivered by Mrs. A. Sridivya, Assistant professor who summarized the key takeaways of the workshop. She encouraged the students to apply the knowledge gained in their personal financial lives and to start investing early in order to benefit from the power of

compounding. She also appreciated the active participation of the students and acknowledged the efforts of the organizers in making the workshop a success.

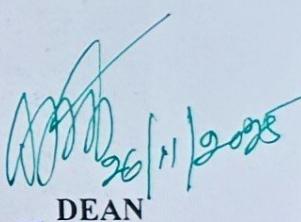
### **Vote of Thanks:**

Ms. Gyanavi student of MBA Second year proposed the Vote of Thanks and expressed her sincere gratitude to everyone who contributed to the success of the workshop on "**Financial Wisdom through Financial Instruments.**" She respectfully thanked the Dean, School of Management Sciences, for the encouragement, guidance, and support extended to the program. She also conveyed her appreciation to the resource persons for sharing their valuable knowledge and practical insights, which greatly enriched the learning experience of the participants.

She acknowledged the efforts of the organizing committee and faculty members for their meticulous planning and coordination in conducting the workshop smoothly. Ms. Gyanavi extended her heartfelt thanks to the students for their active participation, enthusiasm, and keen interest throughout the session.

### **Conclusion:**

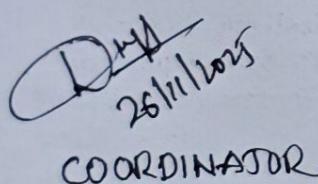
The workshop on "Financial Wisdom through Financial Instruments" was highly informative and enriching. It successfully enhanced the financial awareness of the participants and provided them with practical insights into smart investing and financial planning. The program reinforced the importance of making informed financial decisions and inspired students to become financially responsible and confident investors in the future.



30/11/2028

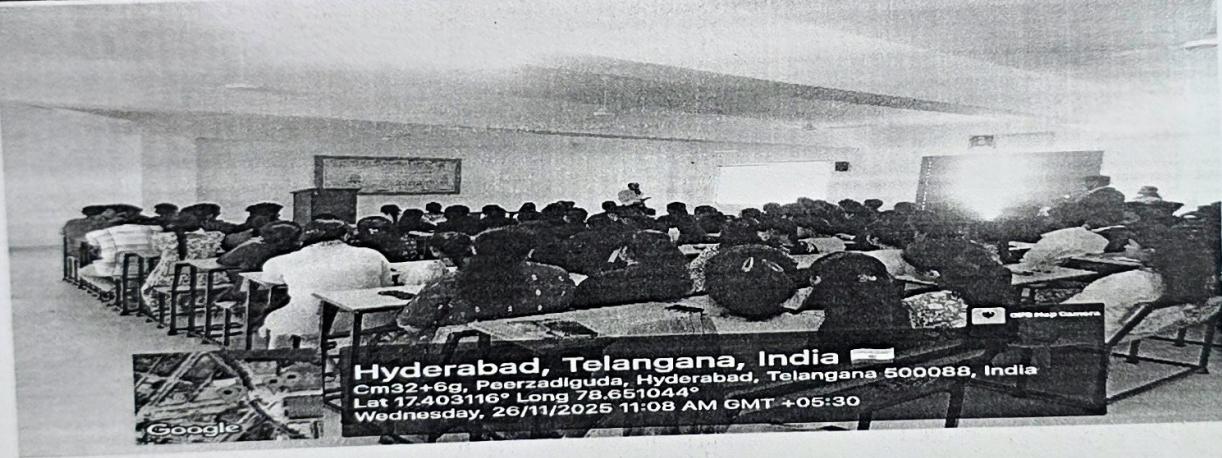
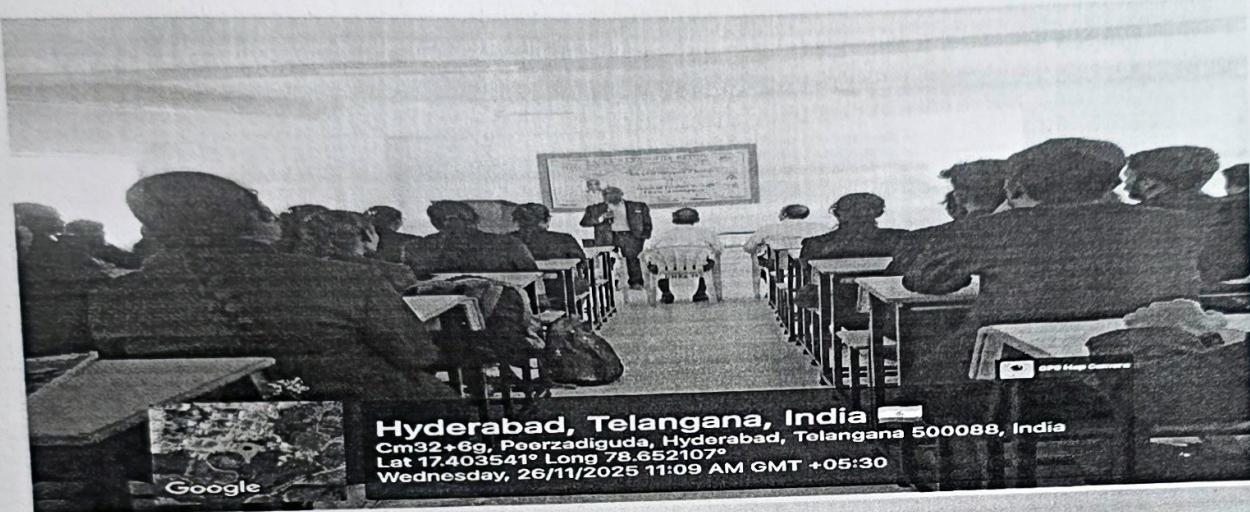
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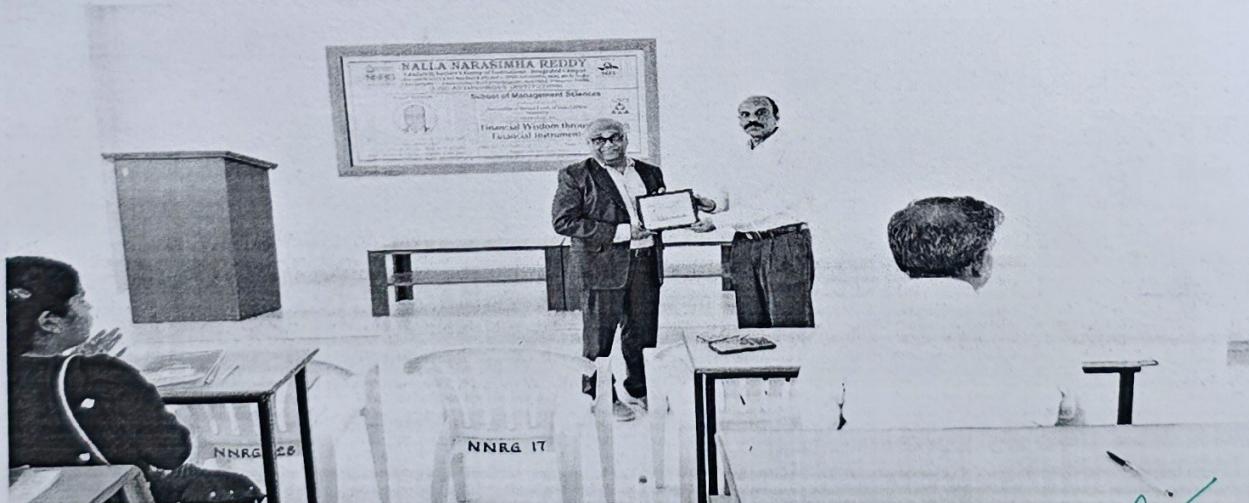
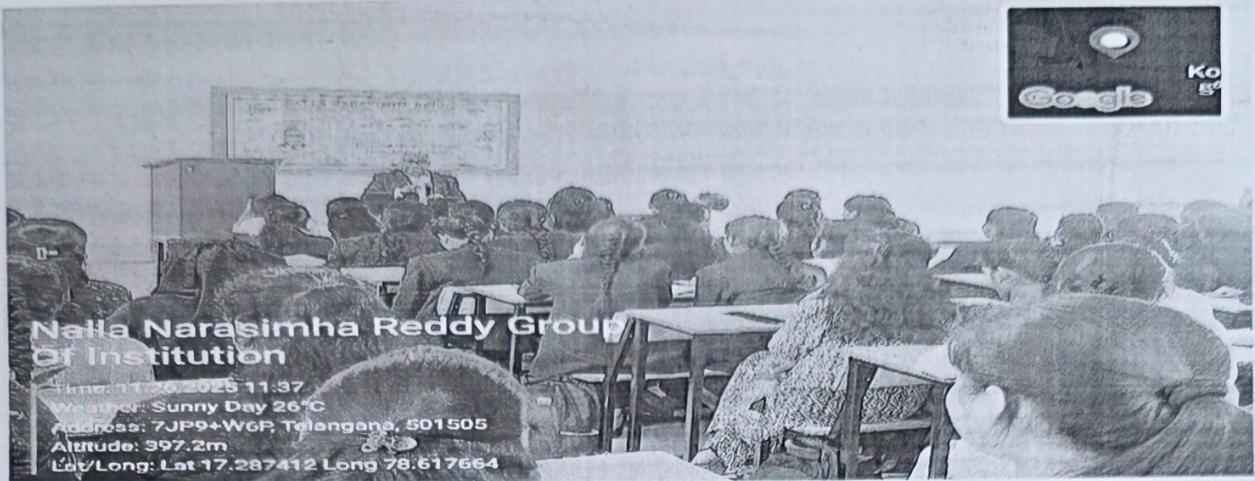
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26/11/2028

**COORDINATOR**





*26/11/2025*  
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