

Prestige Institute of Management and Research, Indore

Data Requisition Sheet

Type of Activity Organized (Please tick)	<ul style="list-style-type: none"> • Management Development Program • Faculty Development Program • Student Training Program/Certifications ✓ • Consultancy • Co-Curricular Activity • Extra Curricular Activity 		
Title	Grooming session 2 (Personal Finance and Advance Excel) by Management Lab 2.0		
Number of Faculties Coordinating	2		
Name of the Faculty/s Assigned and Designation	Ms. Aditi Gaykwad, Research Associate Dr. Deepesh Y. Mahajan, Assistant Professor		
Duration (DD/MM/YYYY)	From Date: 25 th April 2021	To Date: 25 th April 2021	Total No. of Hours: 01
Whether On Campus/Off Campus (Please Mention)	Zoom Meet		
No. of Participants	Professors	02	
	Candidates	46	
<u>Description of the Activity:</u>			
<p>On 25th April 2021, the Grooming Session 2 for Executives was done by Management Lab in Prestige Institute of Management and Research, Indore. The course was done in Zoom Meet with the presence of Ms. Aditi Gaykwad Ma'am, Dr. Deepesh Y. Mahajan Sir. Around 46 candidates participated in this session along with the seniors. Trainer for the course was Ms. Aditi Gaykwad, Dr. Deepesh Y. Mahajan.</p> <p>The course is held on every Sunday. This course has let them dive deep into concepts of Finance and Advance Excel. In this session discussion held on:-</p> <ul style="list-style-type: none"> • Description about the returns (in context to Wipro) • Returns (Investment portfolio of different companies.) • First things first: With the first salary. • Investment Process 			

- Economic analysis
- Industry analysis
- Company analysis
- Description about the sample family budget.

Snapshots

S.No.	Particulars	Mr. A	Mrs. A	Total
1 Income:				
	Salary	50000	60000	110000
	Investment Income	15000	12000	27000
	Total Income	65000	72000	137000 (I)
2 Expenses:				
Mandatory Expenses:				
	P.F.	4000	5000	9000
	Tax	5000	7000	12000
	Loan Repayment		12000	12000
Essential Living Expenses:				
	Grocery		12000	12000

Returns

Investment Portfolio (03/April/ 2000)			
Stock	Price	Qty.	Investment
ACC	152.70	65	9,925.50
Asian Paints	413.60	24	9,926.40
Bosch	3,575.00	3	10,725.00
Cipla	1,201.10	8	9,608.80
HDFC Bank	247.15	40	9,886.00
Infosys	8,252.55	1	8,252.55
Larsen & Toubro	303.15	32	9,700.80
Mahindra & Mahindra	348.90	28	9,769.20
Nestle India	376.10	26	9,778.60
Tata Steel	122.65	81	9,934.65
Total Investment			97,507.50

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- ### First Things First : With First salary
- Budgeting
 - Term Insurance Cover (How Much)
 - Medical Insurance Cover
 - Emergency Fund (6 Months Salary/ Exp.)
 - Target/ Goal Planning
 - Home/ Marriage/ Car
 - Vacation/ Tour (Yearly)
 - Children
 - Education
 - Marriage
 - Retirement

