



LOYOLA COLLEGE [AUTONOMOUS]

College of Excellence

Chennai-600034



Department of B.Com. (Honours)

Cordially Invites you to

A seminar on

WealthWise: Mastering Micro and Macro - Financial Strategies



Mr. Glenn Roger Carr

Co-Founder & Director at
Finmark Trainers India Pvt Ltd



Dr. Sidheakya PG

Senior Manager of Investment Services
at Wealth Works Capital Pvt Ltd

AUGUST

THURSDAY &
FRIDAY

29th & 30th

11:00 AM to
1:15 PM

**LIAC CONFERENCE HALL
COMMERCE & ECONOMICS BUILDING
4th FLOOR**



WealthWise: Mastering Micro and Macro -Financial Strategies

The sessions are focused on equipping participants with an understanding of both micro and macro financial strategies. The seminars will provide insights into how individual financial decisions (micro) interact with broader economic trends (macro) to influence wealth management and investment outcomes.

AGENDA

Welcome Address

Introduction to Chief Guest

Chief Guest Address

Q&A Session

Vote of Thanks

Organising Committee

Dr. Reena F	Dr. R. Leema Rose	Dr. Jerusha Irene D	Dr. Minothi J
Co-ordinator	Asst. Professor	Asst. Professor	Asst. Professor

LOYOLA COLLEGE(AUTONOMOUS), CHENNAI -34

DEPARTMENT OF B.COM (HONOURS)

Report on Wealth Management Seminar

The student development programs held on August 29th and 30th, 2024, focused on "Learning Wealth Management: Micro and Macro Perspectives." These sessions aimed to provide students with a comprehensive understanding of wealth management strategies, exploring both personal (micro) and broader economic (macro) aspects. The programs covered a wide range of topics, from individual investment strategies to understanding the impact of global economic trends, equipping students with practical skills for managing wealth effectively.

The first day of the program, led by Mr. Glen Roger Carr, a seasoned financial expert, focused on micro-level strategies for personal wealth management. He discussed various investment approaches and shared insights on key market indicators. Mr. Carr warned about the potential risks of overinvestment in the Indian MSME market, which could lead to a market crash in the future, and highlighted how the Indian stock market remains the largest derivatives market globally. He delved into a range of investment strategies, including quant-based evaluations such as Discounted Cash Flow (DCF) and buyouts, as well as more straightforward strategies like "Buy What You See," which encourages investing based on observed changes in consumer behavior and market trends. Other strategies discussed included the Top-Down approach, starting from global economic stability to specific industries, holding company investing, Moat investing, de-mergers, and open offers like Real Estate Investment Trusts (REITs) and rental yield strategies. He also compared the liquidity of Exchange-Traded Funds (ETFs) versus stock indices and emphasized the importance of reviewing stock investments annually to ensure a robust portfolio.



The second day of the program shifted focus to macro-level wealth management strategies, addressing the broader economic factors influencing investment decisions. The sessions covered diverse asset classes and investment vehicles such as blockchain technology, precious metals (silver and gold), real estate, diamonds, Unit Linked Insurance Plans (ULIPs), bonds, and more. The discussion included safe investment channels like equity, silver, gold, and real estate, and explored more advanced financial instruments like

Portfolio Management Services (PMS) and Alternative Investment Funds (AIFs). The concept of the "Rule of 72" was introduced as a simple way to estimate the time needed to double an investment. Additionally, the program highlighted the growing importance of Central Bank Digital Currencies (CBDCs) and their role in enhancing digital currency and blockchain technology. The session concluded with discussions on the significance of effective tax planning, ring-fencing wealth, succession planning, and managing wealth by reducing risk, reinforcing the importance of portfolio harvesting and balancing for liquidity and wealth growth.



The programs saw enthusiastic participation from over 150 students who engaged actively in discussions, workshops, and interactive activities. The hands-on approach helped students connect theoretical knowledge with real-world financial scenarios, fostering a deeper understanding of wealth management. Students gained valuable insights into both personal investment strategies and the effects of macroeconomic policies on wealth management, developing critical skills for financial planning and risk management.

Overall, the student development programs on wealth management were highly successful, receiving positive feedback from participants who expressed a strong interest in more such sessions. Future programs could explore advanced topics such as tax planning, international finance, and digital assets, helping students stay abreast of evolving financial landscapes.