



**DEPARTMENT OF COMMERCE (SHIFT-II)
LOYOLA COLLEGE (AUTONOMOUS),
CHENNAI - 600034**

**REPORT ON THE GUEST LECTURE
INVESTMENT AVENUES & PORTFOLIO MANAGEMENT
11TH MARCH, 2022**

Venue: LS HALL

Time: 4:45 PM to 6:30 PM

INVITATION

**DEPARTMENT OF COMMERCE (SHIFT-II)
LOYOLA COLLEGE (AUTONOMOUS)
CHENNAI**

ORGANISES AN

'Invited Talk' on

**INVESTMENT AVENUES
&
PORTFOLIO MANAGEMENT**

 **MR. J. SHRIHARI, CMA**
ASSISTANT MANAGER, GENPACT.

 **11th March, 2022**  **LS Hall**  **4:30 PM**



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PHOTOS OF THE SESSION



Dr S. Prasanna Kumar Felicitating the Resource Person Mr J. Srihari



Dr L. Sherley Mary welcoming the Resource Person



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Resource Person addressing about Investment Avenues



Resource Person addressing about Investment Avenues & Portfolio Management



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About the Event:

The Department of Commerce (Shift – II) undertook the initiative to sensitise students on the various investment avenues and the manner in which the portfolio can be managed. It is widely observed that the earning capacity of people has been drastically affected due to the outbreak of Covid Pandemic. People are more concerned on whether they will be able to do their work and live happily without any impediments in the near future. Savings has been considered and has become habitual among various working individuals. The main motive to save money is to face uncertainty and to overcome the fear of loss due to financial hindrances. It is understood as a practice that Savings also acts as a driving factor to convert the same into fruitful investment opportunities.

As graduates, students will be seeking to gain more knowledge on how to use funds more efficiently and effectively in the future. Investment is the one of the channels through which funds can be properly utilized and rewards can be earned. A guest lecture was hosted by the department on 11th March 2022 at Lawrence Sundaram Hall for Commerce graduates by inviting the department alumnus of the 2015 batch, Mr. J Shrihari, a AMFI Registered Mutual Funds Distributor and a Cost and Management Accountant by profession. He also provides end-to-end mutual funds service to his clients and has partnered with India's Top AMC's.

Firstly, Mr Shrihari initiated his presentation by saying what a portfolio is, how to create a portfolio and how to manage the same. He quoted that there are 12 investment avenues available for an individual and mentioned about minimum investment required and lock in period for such investment avenues as applicable. A specific mention was made about NPS, Real Estate Investment Trust, Sovereign Gold Bonds and NCDs and the benefits that accrue to the investor under various investment avenues.

Secondly, Importance of mutual fund investment in the current situation has been clearly explained. It was mentioned by the resource person that Investor might not be confident that his/her investment is safe, which is because the investor might not possess sufficient



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knowledge about the company or the instrument in which he is willing to invest. The resource person denoted that an investor should be able to minimize his/her risks by investing the funds in the mutual fund investment, as the funds are invested in companies that are performing well. Students were also acquainted with how the funds flow from fund house to various companies and how the investor is rewarded. Flowcharts were used to explain classification and categorization of mutual funds, which was well received by the students.

Thirdly, various research platforms were used by the resource person other than power point presentation to explain few other concepts such as investment pattern, performance of investment of a company and so on. Graphs were also used to explain whether investment in a particular company, which students found beneficial as they could be used to predict the future trend of the investment made. Students were enlightened about the various trend charts like CUP Chart, Umbrella Chart, Flag Chart and so on. Acquaintance and usefulness about various ratios for fundamental analysis and technical analysis of investment was highlighted in the session.

Finally, a live case study on the stock of TATA motors was taken into consideration and a detailed explanation for the said stock was done using Fundamental Analysis, Technical Analysis and so on. An interpretation for a time frame for TATA MOTORS was then made using all different chart types explained along with. To conclude, the session was very interactive and participation by the students was highly welcomed by the resource.

Dr S. Prasanna Kumar
Coordinator.