

LJ INSTITUTE OF MANAGEMENT STUDIES

FINEX – 2016-17



FINance EXcellence Series

LJ Institute of Management Studies has a culture of bringing excellence in the students' knowledge in the specialized area of finance by organizing "Finance Excellence Series (FINEX)" every year to create a platform for interaction between students and experts from the different areas of finance for the holistic development of budding financial managers.

FINEX is a structured lecture series, designed to include interactive sessions delivered by industry experts, spread over a few days catering to Corporate Finance, Banking, Insurance and Capital Market and many more emerging areas in finance. It also includes an immersion program to make the young professionals

ready for the corporate world in a more efficient and effective manner by giving them an actual exposure in the companies through the training session.

This year, the series is spread over 3 days, viz., 1st Sept. – 3rd Sept;2016; where industry experts from Kotak Securities, Bajaj Allianz, Yes Bank and Centrum Wealth Management, IndiaNivesh Ltd., CARE Ratings shared their knowledge and experience in the areas of Derivative Markets, Bancassurance, Wealth Management, Banking operations, Taxation and Equity markets etc. Around 150 students participated in the event and enriched their knowledge.

Day 1 – 1st Sept; 2016 – The *first speaker of the day* was Mr. Sahaj Agarwal, Deputy Vice President, Kotak Securities. He motivated the students to identify their personality and align the same with the choice of their work areas in finance. He talked about the growth opportunities in India in terms of its GDP contribution in the world economy and how to track the financial markets through Fundamental Analysis and Technical Analysis charts.

Mr. Chetan Shah – Zonal Bancassurance Manager, Bajaj Allianz, the *second speaker*, highlighted the true picture of the insurance industry and its operation in the present times. He focused on the emergence of Bancassurance in India and the right ingredients of its success in India.

The *third speaker of the day*, Mr. Krishnanand Gaur, Associate Director, Centrum Wealth Management, gave the mantra, “*The best thing money can buy is the additional money*” by managing the funds effectively. Quoting some real life examples, he conveyed the money mistakes to be avoided to become wealthy. He also talked about the life goals and how to convert them in financial goals and also discussed the measures to achieve short term as well long term financial goals. He

even shared his experience with the field and the basic skills required to be a personal financial manager or a wealth manager.

Day 2 – 2nd Sept; 2016 – The day begin with **Mr. Prashant Sharma, Regional Head, IndiaNivest Ltd.**, who took the students to the journey of stock market since its establishment to the present times. Also, removing investors’ confusion on stock market and losing money there, he put light on how exactly stock markets operate on technical level.

Mrs. Viral Bagri, Tax expert, focused on GST and its impact on the emerging taxonomy in India.

Day – 3- 3rd Sept; 16 – On the last day, **Mr. Pankaj Popat, Regional Head, Yes Bank**, talked on new dimensions of banking in India and a new outlook of industry in the new IT era.

Mr. Naresh Golani, Senior Manager, CARE Ratings, focused on analysis of the credit risks associated with a financial instrument or a financial entity. He discussed risk assessment model of credit rating and industry risks involved in it.

After the session on 3rd Sept., as a part of immersion program, students went in batches of the 25-30 in three companies, viz., Yes Bank, Ascendum KPS Pvt. Ltd. and Mansukh Securities & Finance Ltd., for practical training.



FINEX Team

