Essentials of Money Management

- 2 Months
- Limited seats

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Learn to save, manage and grow your money

Who is this Program for?

This Program is for all aspirants to enter the exciting world of money and investments as an investor

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Program Outcome

It is designed to help you build a comprehensive investment portfolio across asset classes

What do I Takeaway?

Learn the basic skills of a money manager & become the Money Manager of my family and friends

Program Overview

The Program handholds you on a journey into the world of assets, economy and markets

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What do I learn?

Month 1

- Benefits of savings and investments
- Nuances of compounding
- Understand the macroeconomic variables
- How to analyse various financial Asset classes
- How to allocate money across assets
- How to use an MF as an Investment option
- Create my first investment portfolio

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What do I learn?

Month 2

- How to value debt & equity instruments
- Ways to minimize the market risks in my portfolio
- Role of gold and real estate as an investment
- Role of insurance in financial planning
- Creating my comprehensive investment portfolio

Modules

Month 1

- ✓ Introduction to Savings and Investment
  - •Difference between Savings, Investment, and Speculation
  - •How to convert savings into investment for long-term wealth creation
- ✓ The Eighth Wonder: The Power of Compounding
  - •Its impact on our investments and wealth creation
- ✓ How Macros impact the Markets
  - •Economic Growth
  - •Inflation
  - •Policy Actions
- ✓ Where to Invest? Let's talk about Asset classes
  - •Equity as an Asset Class
  - •Debt as an Asset Class
- ✓ Importance of Asset Allocation
- ✓ Investing through Mutual Funds
  - •Types of Mutual Fund Schemes
  - •Use of Mutual Fund as an investment tool
  - •How to select a MF
- ✓ Creating your own Investment Portfolio
  - •Selection of debt and equity schemes
  - •Monitoring your portfolio
  - •How to Evaluate the Performance of your portfolio
  - •How to calculate investment returns

Modules
Month 2

✓How to value a Bond?
- The practical approach

✓How to value an Equity Share?
- Using bottom-up and top-down methodology

✓Strategies to minimize portfolio risk
- Strategies for debt investments
- Strategies for equity investments

✓Can gold and real estate have a place in an investor's portfolio
- Ways to take exposure to gold
- Ways to take exposure to real estate

✓Insurance and Wealth Protection
- Term Life Insurance
- Health Insurance
- Vehicle Insurance
- Home Insurance

✓A comprehensive portfolio
- Features and Benefits
- Tracking your portfolio
- Evaluating Performance of Portfolio
- Making changes and rebalancing the Portfolio

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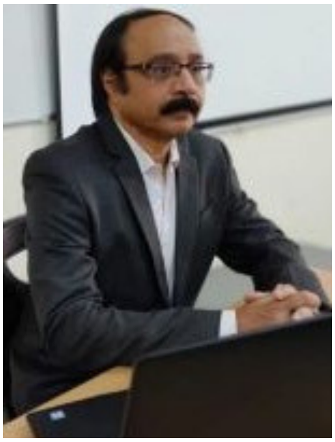
Meet Our Faculty

Jitender Kumar
ICAI,IFIM,NMIMS

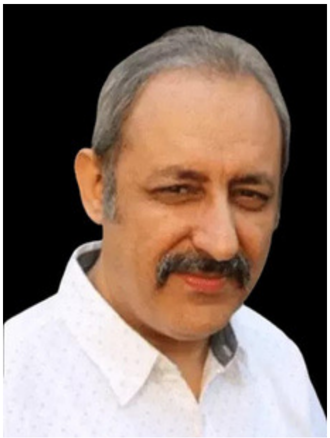
Prof Makarand Bhopatkar
CFA
ADIA-UAE,SP JainGlobal



Prof Venugopal
NMIMS,NISM

Om Ahuja
Ex Brigade Group,JLL,
ABN Amro, Merrill Lynch

Dr Santi Suresh
SIES,Mumbai



Dr Amit Bagga
SP Jain,MDI,IIFT

Meet Our Faculty

Joydeep Sen
Ex- BNP Paribas

Dr Tejinder Singh Rawal
M.Com, .M.A.(Economics),
M.A.(Public Administration),
MA(Urdu), MA(English lit.)
L.B.,FCA,DISA,CISA,CISM,PhD(Tax)

Dr Satish Shrivastava
NADT,Tufts,Boston,
Harvard,Stanford

Sujoy Das
Ex-Head of Fixed Income,
Invesco MF, Bharti AXA MF
and DSP Merrill Lynch MF

Vikram Sengupta
IIM-C alumni,
ex- Lehman Brothers,
Nomura, and founder of
Stratmore Wealth

Certificate

Testimonials

The learning experience at OAWA has been great. In the huge field of finance, OAWA has been a savior by constructing the wealth management course such that it allowed us to focus on all the required key elements. Faculties who taught us are highly qualified industry experts who simplified the learning process and made it interesting. This course has certainly helped me gain a lot of knowledge and insights in the field.

- Ria Vispute (Third Year – Thakur College)

I would like to thank the OAWA team for providing me with this opportunity. It was a really great experience I wish the classes could be offline but it even in online mode they were done in the best possible way. Sujoy sir's way of teaching is really commendable he is very informative and a great mentor.

- Vansh Vaibhav (Amity Noida)

Joined OAWA Wealth management course with the learning mindset of various markets of how they work what economic factors affect which industry and asset class. I just feel so accomplished by learning the art of reasoning of how and why !!

- Chaitanya Agarwal (CA)

Advisory Board

Nilesh Shah

Nilesh Shah is the Group President & Managing Director of Kotak Mahindra Asset Management Co. Ltd. He is also a part-time member of the Prime Ministers Economic Advisory Council (PMEAC). He has also held the position of chairman of the Association of Mutual Funds India (AMFI). He has close to 3 decades of experience in capital markets and market-related investment, having managed funds across equity, fixed income securities and real estate for local and global investors.

Prof. B.B Chakrabarti

Prof Binay Bhushan Chakrabarti is a former Professor of Finance at IIM Calcutta and ex-Director- in-charge of IIM Ranchi. He is a Mechanical Engineer from Jadavpur University, Calcutta (Gold medallist), PGDM from IIM Calcutta (Gold medallist), Cost Accountant from the Institute of Cost Accountants of India, and Ph. D in Economics from Jadavpur University, Calcutta

Advisory Body

Dr Debashis Sanyal

Dr Debashis Sanyal is currently the Director at Great Lakes Institute of Management, Gurgaon. With over 35 years of rich experience in top B-schools. Dr Sanyal has received numerous honours for teaching. He has a Master’s degree from Calcutta University and a Doctoral degree in Commerce. He is a merit holder from the Institute of Cost and Works Accountant of India (ICWAI), where he also served as Joint Director. Before joining Great Lakes, Gurgaon, he was Vice Provost- Management and Dean of School of Business Management at NMIMS for around eight years. Before his stint at NMIMS, Dr Sanyal was Dean at Management Development Institute (MDI), Gurgaon, and headed the EMBA program at S.P. Jain Centre of Management, Singapore.

Dr Kavita A Sharma

Dr Kavita Sharma recently retired as the president of South Asian University, New Delhi. Before this, she was a professor at Hindu College, Delhi University, for 37 years, during which she also served as principal for ten years. Dr Sharma then served as the Director of India International Centre, New Delhi, from 2008 to 2014. She is a life member of several prestigious associations and institutes, including the Indian Association of Canadian Studies, Indian Law Institute, Association of Comparative Literature, and Indian History Congress

Advisory Board

Navneet Munot

Navneet Munot is the MD & CEO of HDFC Asset Management Company Limited, a joint venture of HDFC Ltd. with abrdn Investment Management Limited. He joined the firm in February 2021. Navneet has 28 years of rich experience in Financial Markets.

Prior to joining HDFC AMC, he was the Executive Director and Chief Investment officer of SBI Funds management Private Limited. Navneet was a key member of the executive committee and was responsible for overseeing investments worth over $ 150 billion across various asset classes in mutual funds and segregated accounts. Navneet was a Director on the board of SBI Pension Funds (P) Limited.

About Us

OAWA Investment Education (India's 1st finance-focused EdTech platform) imparts knowledge on finance, investments & wealth. OAWA is managed and advised by market leaders from HDFC MF, Kotak MF, Invesco MF, Lehman Brothers and alumni from IIM Calcutta and Bangalore.






What makes us stand apart?

- Curriculum jointly designed by industry veterans and academicians
- The pedagogy is a blend of fundamental, technical, and soft skills
- We simplify financial jargons

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Program Details

- ✓ Duration: 2 months
- ✓ Start Date: Refer Website
- ✓ Days: Monday & Wednesday
- ✓ Timings: 7-8pm
- ✓ Fees: Rs 19,900/-*

**Inclusive of 18% GST.*

Apply Now

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Contact Us

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