



Program in Financial Wellness

WISDOM

Length: 2 months

Learn to
**SAVE, MANAGE
AND
GROW YOUR MONEY**



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Program Overview -

HOW TO LIVE WITHOUT THE FEAR OF FINANCE

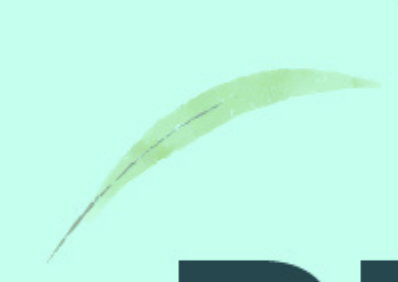
The Program handholds you on a journey into the world of assets, economy and markets.



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WHO IS THIS PROGRAM FOR?



This Program is suitable for all karma yogis who are looking to take control of their savings and prepare themselves to become an investor and enter the world of money and investments.



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Program Outcome -

ARTHIC SAMRUDDHI

At the end of the Program, every learner will be able to build a holistic understanding of the financial and economic environment and build a comprehensive investment portfolio across asset classes. Build appropriate insurance buffers.



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What do you take away?

FINANCIAL PEACE & PROSPERITY

Learn the basic skills of a money manager and become the money manager of your family and friends



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What do you learn?

FINANCIAL WELLNESS WISDOM

1st month

- * Benefits of savings and investments
- * Nuances of compounding
- * Understanding the macroeconomic variables
- * How to analyse various financial asset classes
- * How to allocate investments across assets
- * The use of MF as an investment option
- * Create your investment portfolio



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WHAT DO YOU LEARN?

2nd month

- * How to value debt & equity instruments
- * Ways to minimise the market risks in your portfolio
- * Role of gold and real estate as an investment
- * Role of insurance in financial wellness
- * Create a comprehensive investment portfolio



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MODULES

1st month

Introduction to Savings and Investment

- * Difference between Savings, Investment and Speculation
- * How to convert savings into investments for long-term wealth creation

The Eighth Wonder: The Power of Compounding

- * Its impact on our investments and wealth creation

What are macros, and how it impacts our savings and investments

Economic growth | Inflation | Policy actions

Lets discuss asset classes

- * Equity as an asset class
- * Debt as an asset class



How to allocate assets

- * Identify low-risk assets
- * Improve the outcome with diversification

Investing with mutual funds

- * Types and their identification
- * How to select
- * Use MF as an investment tool

Creating your investment portfolio

- * Selection and investment of debt and equity schemes
- * Monitoring the investments
- * Calculate investment returns
- * Ways to evaluate the performance



MODULES

2nd month

How to value a Bond?

- * The practical approach

How to value an Equity share?

- * Using the bottom-up and top-down methodology

Strategies to minimise 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 build exposure in gold
- * Ways to build exposure in real estate





Insurance and wealth protection

- * Life and non-life insurance

Building a comprehensive portfolio

- * Features, benefits, selection & investment in a variety of assets
- * Tracking the portfolio
- * Evaluating the performance of the portfolio
- * Making alterations and rebalancing the portfolio



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SHIKSHA GURUS



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ICAI, IFIM, NMIMS



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ADIA-UAE, SP Jain Global



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WELLNESS CERTIFICATE



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ABOUT US

OAWA is managed and advised by professionals from MF and the wealth management industry and academicians and alumni from IIM Calcutta and Bangalore. We deliver curated financial wellness programs for corporate clientele.

OUR TEAM



Bekxy



Sreeja



Vikram



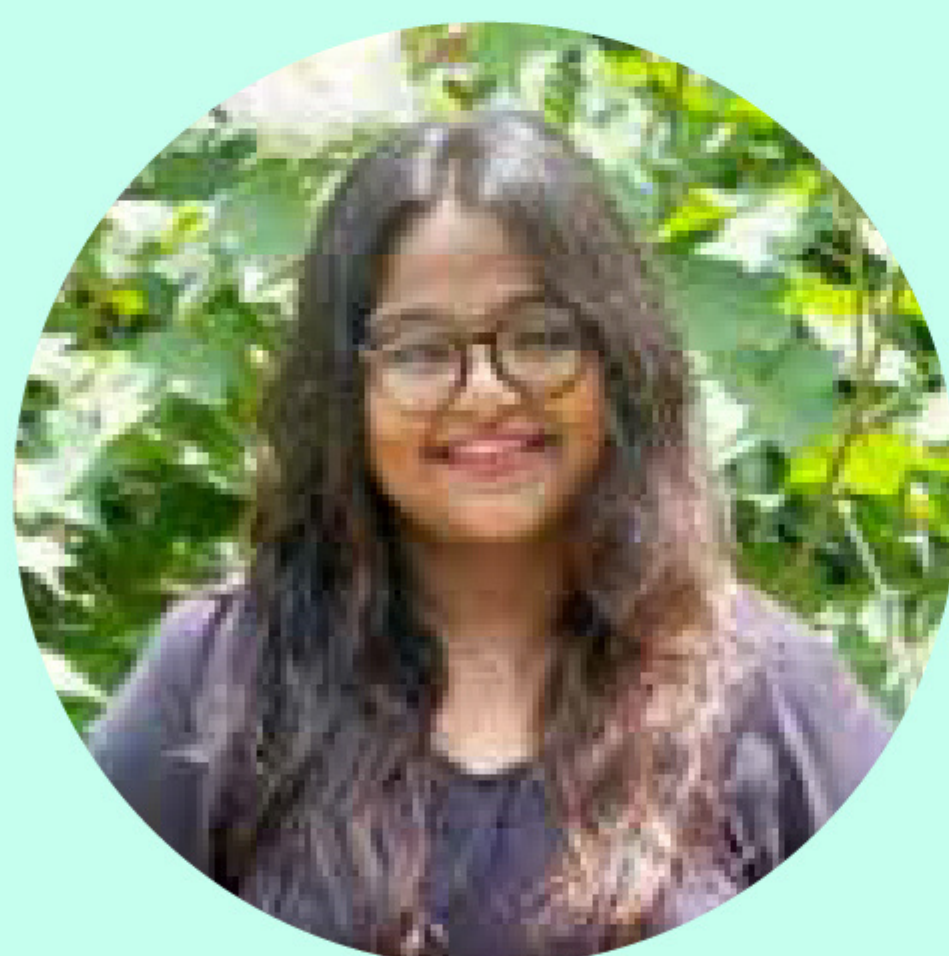
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WELLNESS PROGRAM DETAILS



Length: 2 months

Commencement: Monthly

New Batch commences every
3rd Tuesday of the Month

Sessions: Tuesdays and Thursdays

Timings: 7-8 pm

Fees: Rs 19,900/- (inclusive of GST)

Apply Now



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GET FINANCIALLY FIT TODAY!
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