



## B.V. Patel Institute of Management, Uka Tarsadia University



Date: 25-03-2021

### Workshop on How to Construct Portfolio

Student Development Cell of the Institute has arranged workshop on “How to Construct Portfolio” on 25<sup>th</sup> March 2021 from 9:00 am to 2:30 pm. The resource person of the session was Mr. Sagar Panchal who is the Proprietor of Raging Success Financial Planners.

Students were provided an opportunity to be a part of this session and were encouraged for participative communication during the session. The workshop was well structured and effectively presented. It involved presentation of aspects in consideration to the various parameters. The speaker had shared some practical experiences of how to construct a portfolio and what all aspects to be kept in mind while constructing an effective portfolio.



The main learning's from the session are as follows:

- Dissimilarities between investment and savings.
- About various investment avenues available for investment.
- About the parameters to be considered during investment like liquidity, safety, returns and taxation.
- Learned about the power of compounding interest.
- Practically analyzed the higher performing stocks in the market and lower performing ones.
- Learned how to analyse and choose the best performing stocks to be included in a portfolio.
- Learned about the various fundamental and technical analysis tools.
- Learned how to construct a portfolio from scratch.

Summing up, the session was very informative, interactive and helped us to gain knowledge of portfolio construction. The speaker, Mr. Sagar Panchal was very interactive and shared

pool of knowledge and experience with all the students. The carried on session by Dr. Vijay Gondaliya Sir was also of much help to the students in present as well as in future too.

In the second half of the session were students get hands on portfolio construction using real data with the help of MS Excel.

Thus, it was overall an enlightening workshop that was worth attending and listening to.

