



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



Date: 09-10-2023

Session on Portfolio Construction with Fundamental and Technical Analysis

Objective of the Session: Session is to equip students with a comprehensive understanding of the principles, tools, and strategies of Fundamental and Technical Analysis involved in effectively managing investment portfolios.

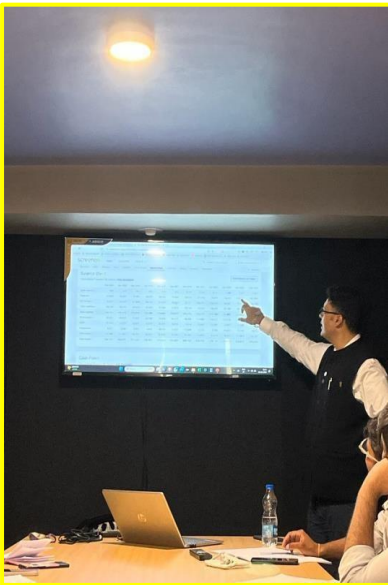
Outcomes of the Session: At the end of session, students able understand the importance and parameters to study for fundamental and technical analysis while constructing the portfolio.

Date:	9-10-2023
Time:	9:30 am to 11:30 am
Venue:	GD-1 Central Library
No. of Students:	35 Students of TYBBA
Name of speaker:	Mr. Sagar Panchal, Owner – Ragging Success, Navsari
Coordinator:	Dr. Vijay Gondaliya
Category:	Management Club

35 students of Last Year BBA (Finance) had attended the session on “Portfolio Management with fundamental and technical analysis” Mr. Sagar Panchal had efficiently delivered the session on Portfolio Management with Fundamental and Technical Analysis was conducted with the aim of providing participants with a comprehensive understanding of the two primary approaches to managing investment portfolios: Fundamental Analysis and Technical Analysis.

Following points discussed during the session:

- Importance of investment
- What does investor look for why investing his money?
- Power of Compounding
- Which parameters play an important role in deciding valuation of shares through fundamental analysis and technical analysis.
- How to Diversify Portfolio in Large Caps, Medium Caps & Small Caps companies.
- How to do analysis in real-time market and with different websites like screener.in, www.bseindia.com and www.investing.com.
- SIP Calculation (after deducting charges and tax)



Mr. Panchal had discussed the portfolio construction and management. He has also showed various fundamental analysis regarding investment and while analysis few points to keep in mind when you check your portfolio are the market cap, stock price, industry price, book value, price to book value and debt to equity. Mr. Panchal showed even its technical analysis of the different listed companies in the market where we got practical knowledge.

Really an amazing session where speaker and students were interactive for the whole session.