

REPORT

Financial Literacy Session

Date: 15/07/2024

Venue: MBIT Auditorium

Time 2-4 pm

Speaker: Mr. Mukesh Patel: Director, Khushi Wealth Private Limited.



On July 15th, 2024, MBIT hosted a comprehensive session on financial literacy with a primary focus on mutual funds. The event aimed to educate students and staff members about investment strategies and processes for enhancing personal savings. The session was conducted by Mr. Mukesh Patel, a prominent entrepreneur and director of KHUSHI WEALTH PRIVATE LIMITED. With over 20 years of experience in the financial market, Mr. Patel has managed portfolios for more than 2000 investors and conducted over 300 investor awareness programs across Anand and Vadodara.

Mr. Patel began by elucidating the concept of mutual funds, describing them as investment vehicles that pool money from multiple investors to invest in a diversified portfolio of stocks, bonds, money market instruments, and other assets. During his presentation, Mr. Patel provided insights into historical and modern investment

trends. He underscored India's progressive economic growth, which has bolstered investor confidence in mutual funds as a secure avenue for savings and wealth accumulation through interest accrual. Participants expressed gratitude and satisfaction for the invaluable knowledge imparted by Mr. Mukesh Patel. His session not only demystified complex financial concepts but also inspired attendees to consider strategic investments aligned with their financial goals and risk tolerance. In conclusion, the "Financial Literacy Session on Mutual Funds" at MBIT was a resounding success, thanks to Mr. Mukesh Patel's expertise and engaging presentation style. The event served as a catalyst for fostering greater financial awareness and empowering participants to make informed investment decisions. "An investment in knowledge pays the best interest." This quote resonated throughout the session, encapsulating the essence of financial education and its transformative potential in enhancing personal financial well-being.

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