



Program Completion Report

Online Management Development Program (MDP) on Fundamental Analysis and Value Investing

Duration: 20.09.2021 – 24.09.2021

Background of the Program

Investors have a plethora of alternatives for spending their hard-earned money and one of the most rewarding is investing in a company's equity. However, a lack of understanding of how to choose these profitable/rewarding stocks results in a decline in their returns. The mentioned MDP has provided fairly good information and training to experienced and naïve investors to take wise decision in equity market.

Resource Persons

Dr. Kiran Mehta

Dr. Kiran Mehta is Professor at Chitkara Business School, Chitkara University, Punjab (India). Her research areas include Security Analysis, Corporate Finance, Market Efficiency, Venture Capital, Social Responsibility and Ethical Finance, Financial Inclusion, Innovation and SMEs. She has several papers to her credit published by Emerald, Sage, Springer and Elsevier. She is a consultant to MSMEs and start-ups.

Dr. Renuka Sharma

Dr. Renuka Sharma is Professor at Chitkara Business School, Chitkara University, Punjab (India). Her research areas include Security Analysis, Corporate Finance, Market Efficiency, Portfolio Management, Innovation and SMEs, Responsible Investing, Venture Capital, and Corporate Governance. She has several papers to her credit published by Emerald, Sage, Springer and Elsevier. She has successfully completed consultancy projects to various SMEs and start-ups.

Dr. Vishal Vyas

Dr. Vishal Vyas is Finance Faculty at ABV- Indian Institute of Information Technology and Management, Gwalior (India). He is an expert in Finance (Derivatives, Equity, IPO Valuation etc.). He has research papers to his credits in reputed journals published through Elsevier,



Emerald, Inderscience, Sage, Taylor & Francis, etc. His research interest includes Financial Risk Management, Derivatives, Portfolio Management, Investment Analysis, Project Finance and Research Methods. He has been a resource person for many FDP programs (Econometrics, R-program, Financial Modeling etc) conducted by various government and private universities.

Topics Delivered

The content of the training program was as under.

- Introduction to Fundamental Analysis: Scope & Users, risk and return analysis.
- Understanding Macro Parameter and its impact on Business trajectory
- Discussion on Value investing strategies of Warren Buffet, Benjamin Graham, Peter Lynch etc.
- Impact of Monetary and Fiscal measures
- Reading/understanding Financial Statements-Balance Sheet, P & L Account, Cash Flow Statement etc.
- Understanding Ratio/Margins and its interpretation
- Liquidity/Profitability/Coverage/Leverage Ratio and their utility
- Gross Profit/Operating Profit/EBIT/PAT Margin-for efficiency testing
- Learning relative valuation concept and interpretation
- Real life case studies of different companies

About Participants

A total of fifteen participants/investors from diverse background participated in the MDP. It includes entrepreneurs, banker, CA (inter), management trainee and individual investors.

Participants' feedback.....

"I learnt about various factors one should take in consideration while investing in share market. How screener app help investors in selecting a stock, about credit rating as well and so many other relevant topics relating to investment. The knowledge and proficiency of the expert was great."

"The content of MDP was very good. I learnt about screeners and basic valuation model."

"I learnt how to analyze a company for investment purpose. It was very interactive MDP and more than my expectations."

"It was a complete package of knowledge and the concepts were taught in a user-friendly way. I gained a lot about companies to be considered before making investment."



“I learnt about the strategies of good investment. The way resource persons presented their relevant data actually enhanced my knowledge in this field”

“I got deep knowledge about investing in shares. I enjoyed the relevant and practical approach by resource persons.”

“The sessions were very interactive and I got deep knowledge about investing in shares.”