



Krantiveer Vasantrao Narayanrao Naik Shikshan Prasarak Sanstha
LOKNETE GOPINATHJI MUNDE
INSTITUTE OF ENGINEERING EDUCATION & RESEARCH
Approved by AICTE, Accredited 'B' Grade By NAAC
Canada Corner, Sharanpuri Road, Nashik-422 002



AD-	Workshop Report	Academic Year: 2025-26
		Semester – II & IV

Department of Management Studies

Seminar/Workshop Title:	NISM VA – Mutual Fund Advisor Exam Preparation
Date:	16/04/2026 To 18/04/2026
Duration:	3 Days
Venue:	LoGMIEER Department of Management Studies
Resource Person:	Mr. Hitesh Panchal , Director, RP Investment Firm, Thane
Coordinator:	Prof. Rahul Thorat
Objective:	<ul style="list-style-type: none">• To understand the various concepts of mutual fund• To learn regulations and guidelines issued by SEBI• To Analyze MF investment processes and documentation• To learn NAV calculation and performance evaluation• To build advisory and ethical skills• To understand the working of mutual fund industry in India• To develop skills to suggest suitable investment options
Outcome:	<ul style="list-style-type: none">• Students gained knowledge of Power BI tools and features• Understand the basic structure of mutual fund• Understand the process and documentation• Learned the advisory and ethical skill• Developed the ability as a mutual fund advisor
Mapped with PO	
Mapped with PSO	

Report of the Workshop:

KVN Naik SPS's Loknete Gopinathji Munde Institute of Engineering Education & Research, Nashik,
The Department of Management Studies,
Organized a NISM VA – Mutual Fund Advisor Exam Preparation Workshop for students to enhance
their knowledge of mutual fund concepts, financial planning, and regulatory guidelines. The workshop

aimed to build exam readiness through practical insights, mock tests and concept clarity, enabling students to confidently pursue certification and careers in the financial services sector.

The workshop was conducted from 16th April to 18th April 2026, from 10:00 am to 5:00 pm

The session was conducted by the resource person, Mr. Hitesh Panchal, who explained the concept and working of mutual fund industry in India.

The workshop covered various concepts of mutual funds including types, features and benefits for investors. It also provided insights into regulations and guidelines issued by Securities and Exchange Board of India, along with mutual fund investment processes and required documentation. Students learned about NAV calculation and methods of performance evaluation to assess fund efficiency. The session focused on building advisory and ethical skills essential for financial professionals. Additionally, it explained the structure and working of the mutual fund industry in India, preparing students for real-world applications.

The workshop was interactive and informative which provided the students practical exposure through real life practical cases and situations followed by MCQ based questions and answers

Overall, the workshop was successful and beneficial for all the participants.

Photographs (geotag):





Rahul

Prof. Rahul Thorat
Coordinator

Sarika

Dr. Sarika Patil
HOD

K.V.

Dr. K. V. Chandratre
Principal

