



Kalpataru Vidya Samsthe ®
DEPARTMENT OF MASTER OF BUSINESS ADMINISTRATION
KALPATARU INSTITUTE OF TECHNOLOGY, TIPTUR-572202
(Affiliated to Visvesvaraya Technological University Belgaum & approved by AICTE, New Delhi)



KIT ESTD. 1986, MBA ESTD- 2008

Prof. Deepthi Amith

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Ref: KIT/MBA/EVEN SEM/22/2021

Date: 24-09-2021

To
The Principal,
Kalpataru Institute of Technology,
Tiptur.

Sub: Requisition to conduct Training program for MBA students.

Topic: Training on Indian Securities Market named as "Kona Kona Shiksha".

Dear Sir,

With reference to above subject we would like to conduct the **Certified Training Program on Indian Securities Market** named as "Kona Kona Shiksha-an initiative by National Institute of Securities Market and KOTAK Securities in association with Knowledge Bell.

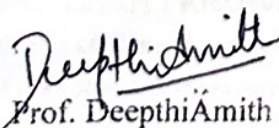
The objective of the program is to improve the employability of the students in the Banking and Investment Industry sector. The program demands 10hrs of an online class with a batch size of 60 to 100 students per batch. The program is delivered by Knowledge Bell and sponsored by NISM and Kotak Securities. The program is offered completely free of cost to committed students.

Tentative dates : 07th to 9th October 2021.
Timings : 10am to 12pm, 2pm to 4pm.
Mode of conduction : Online.

Hence, kindly permit us for the same.

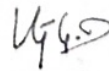
Thanking You,

Yours faithfully


Prof. Deepthi Amith

Prof. & Head

Dept of MBA, KIT, Tiptur



NISM Securities Market Program for PG Students

Vinod Tantri <vinodtantri@knowledgebell.com>

Thu 9/23/2021 12:23 PM

To: Principal <principal@kittiptur.ac.in>; DEEPTHI AMITH <deepthiamith@kittiptur.ac.in>

3 attachments (234 KB)

Vinod Tantri - Trainer Profile.pdf; NISM Student Program (2).docx; Empanelment_Letter_20082021080018.pdf;

Greetings,

Thank you for sharing your contact.

National Institute of Securities Market and -KOTAK Securities in association with Knowledge Bell conducting training on **Indian Securities Market** named as "Kona Kona Shiksha".

The objective of the program is to improve the employability of the students in the Banking and Investment Industry sector. The program demands 10hrs of an online class with a batch size of 60 to 100 students per batch. The program is delivered by Knowledge Bell and sponsored by NISM and Kotak Securities: **The program is offered completely free of cost to committed students.**

Applications are invited from various colleges. Eligibility criteria B.B.A Final year, M.Com, MA (Economics), MBA, MCA, BE,LLB/LLM only.

Process of the program:-

Step 1: Fill in the application form (to be filled by the college authorities).

Step 2: Post the approval from NISM, student data will be collected from your college.

Step 3: Online classes will commence as per the approval. Post-completion of the online test certificates will be issued to the students.

Kindly click the google form and fill in the details <https://forms.gle/ttrgGoQ11AT4kyCj6>

Course content and Trainer profile is attached. Connect undersigned for any clarification.

Kindly revert to this email post filling the form.

Note:

Eligibility criteria B.B.A Final year, M.Com, MA (Economics), MBA, MCA, BE,LLB/LLM.

Regards,

Vinod Tantri | KNOWLEDGE BELL

28/1, 1st Floor, Near Adithi Victory II,

1st Cross Road, Srirampura, Bangalore, Karnataka - 560021

Mobile:9986021204

You are Invited - NISM - Securities Market Training by KIT- Tumkur and Knowledge Bell, Bangalore

Shubha Pai <shubha@knowledgebell.com>

Tue 10/5/2021 4:12 PM

To: Principal <principal@kittiptur.ac.in>; DEEPTHI AMITH <deepthiamith@kittiptur.ac.in>; Vinod Tantri <vinodtantri@knowledgebell.com>

Welcome,

We are super excited to meet you on 7th October!

Your seat is confirmed for the "NISM Kona Kona Shiksha" Financial Education Program. Your 3-day class is scheduled for the 7th, 8th and 9th of October between 10.00 AM to 12.00 PM and 2.00 PM to 4.00 PM.

National Institute of Securities Market and Knowledge Bell academy in association with **KALPATARU INSTITUTE OF TECHNOLOGY** conducting classes on Indian Securities Market named as "Kona Kona Shiksha". Post 10 hours of an online class and assessment, students will be awarded a certificate from NISM and Kotak Securities.

The objective of the program is to improve the employability of students in the area of Banking, Financial Services, Investment and the FinTech sector.

About Resource Person Mr. Vinod Tantri:

Vinod Tantri is the Founder of "Knowledge Bell", Bangalore. He is an MBA, CWM and IA with 21 years of experience in the Investment Industry. He is a trainer for the Securities and Exchange Board of India, NSE Academy and NISM. Vinod has addressed over 45,000 investors in his 1500 programs conducted in over 160 cities.

Click and join this group for better communication during the 3-day class: <https://chat.whatsapp.com/Hth70xt111bEe9nrj4fmEG>

Shubha Pai | KNOWLEDGE BELL

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www.knowledgebell.com



VINOD

TANTRI

TRAINER | TRADER | SPEAKER

The world of investment is an extremely exciting place to be in. With the right guidance and support, it can bring great success to you. It is our endeavor to help you become proficient in the world of investment and financial services sector so that you can achieve your personal goals.

CONTACT

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Bangalore

Vinod comes from a humble family based out of a village in Karnataka. Back then like most people, for Vinod's family, financial literacy was a blind spot and Equity trading was gamblers paradise.

Post his graduation he joined the Investment industry. His realization that "Investment in knowledge pays the best interest" carved his passion for spreading financial literacy. He is in Investment industry since 2002, in Training since 2013 and Trading since 2016. Vinod has been coached by renowned personalities in the area of trading, investing and speaking.

He is a registered trainer for NISM, NSE and several NBFCs. Under his leadership, team "Knowledge Bell" has exhibited remarkable achievements. The team has a track record of conducting over 1400 investor awareness programs and 150 workshops across the country. Technical Analysis is his favorite subject, he has helped several finance and non-finance professionals in generating second income.

He has successfully handled assignments with financial institution like ICICI Bank, HDFC Bank, HDFC Mutual Funds and Axis Mutual Funds. Vinod has served with organisations like DBS Bank, Axis Asset Management, SBI Mutual Funds and Prudential ICICI AMC.

He holds an MBA and is certified as a "Chartered Wealth Manager" from American Academy of Financial Management and certified as an "Investment Adviser" from National Institute of Securities Market.

"We just share, YOU learn and LOVE it" that's how he appreciates his students.

Vinod aspires to be India's most preferred knowledge partner in Trading and Investment learning.

**Certificate of Empanelment as NISM Resource Person For Kotak Securities
Financial Education Program - "Kona Kona Shiksha"**

Dean, NISM

Tel No: 02 192 668348

Email: vr.narasimhan@nism.ac.in

N/SO/KARN/10

01-Jul-2021

Vinod Tantri

KNOWLEDGE BELL, #28/1, 1st Floor, Near Adithi Victory 2, 1st Cross Road,
Srirampura

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560021

Karnataka



Madam / Sir,

1. Please refer to our interactions with respect to enrolling you as Resource Person (RP) for NISM -- Kotak Securities CSR ("Kona Kona Shiksha") project. This was followed by your training during June 2021.
2. We are pleased to certify you as NISM's RP for conducting Investor Financial Education session at various colleges. You are called upon to spread Financial education by conducting Financial Education Programs of 10 hours duration for the benefit of for students who are pursuing final year of graduation, post graduate courses (preferably B.B.A, M.Com, MA (Economics), MBA, MCA, BE, LLB/LLM) as per the Operational Guidelines of NISM as amended from time to time.
3. Accordingly, this Kotak Securities CSR project executed by NISM on Financial Education for young citizen endeavors to impart participants with a better understanding of securities market. The program will also make them aware about the career opportunities available in Securities Markets. The **Kona Kona Shiksha** Program would cover the following topics (amongst others):
 - i. Importance of Investments
 - ii. Introduction to Securities Markets;
 - iii. Primary Markets and Secondary Markets;

Session Number	Session Name	Session Sub Topic	Time Allotted
1	Importance of Investment	Importance of Financial Education	90 Minutes
		Why Investment Needed	
		Difference Between Savings and Investments	
		Power of Compounding	
		Goal Based Investment	
		Price of Procrastination	
		Rule of 72	
2	Financial Investment Opportunities	Introduction to Various Financial Products	30 Minutes
		Equity and Debt products along with Sub classes	
		Direct Investing in Securities Market	
		Investment through Mutual funds	
3	Process and prerequisite to invest in Securities Markets	KYC Compliance including KYC for mutual funds.	60 minutes
		PAN mandatory; Aadhar is also required	
		KRA's	
		e-KYC	
		3 - in One Bank Account	
		Precaution while opening various accounts	
4	Investment in primary markets	Types of Issues	90 mnts
		What is IPO	
		How to invest in IPO	
		Role of Various Intermediaries	
		Things to check before applying in IPO	
		Information in Offer Document	
		ASBA	

Session Number	Session Name	Session Sub Topic	Time Allotted
		Book Building - how to bid; what to check (ie., bids/price given by qib, etc)	
		Checking Allotment Status in IPO	
5	Investing in secondary markets	Why Secondary Markets	90 minutes
		Difference between Primary Market and Secondary Markets	
		Pre Trade Due Diligence	
		Modes of Placing orders	
		Types of orders	
		Post Trade Checks - Contract Notes	
		settlement of trades	
		Running Account Settlement	
		information on company available on stock exchanges	
6	Mutual Funds	What is Mutual Fund	90 minutes
		Structure of Mutual Fund	
		How Mutual Fund works	
		Classification of Mutual Funds	
		Categorization of Mutual Fund Schemes	
		How to Invest in Mutual Fund	
		Investment Modes - Lumpsum or SIP	
		Investment Modes - Direct or Regular	
		Growth Vs Dividend Options	
		Information about Mutual Funds	
		Risk o Meter, Fact Sheet and their importance	
		Concept of NAV	

Session Number	Session Name	Session Sub Topic	Time Allotted
7	Precautions while investing in securities markets	Risks Associated with Securities Markets	60 Mins
		How to mitigate Risks	
		Rights and Responsibilities of Investors	
		Do's and Don't's of Investing in Markets	
		Investor Grievance Mechanism in Securities Markets	
8	Career in Securities Markets	Opportunities available in Securities Markets	60 mins
	Mandatory Certification to participate in Securities Markets		
	How to Set up Securities Markets franchise for various market opportunities		

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Program I Participants Name Quiz Result List

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Certificate

This is to certify that

Sanjay G R

From **Kalpataru Institute Of Technology** participated
in the program "**Kona Kona Shiksha**", conducted by National Institute of Securities
Markets (NISM) under
the aegis of CSR program of Kotak Securities Limited
On **09-Oct-2021** and the Quiz conducted
subsequent to it.

V.R. Narasimhan

Dr. V.R. Narasimhan (Dean, NISM)