National Institute of Securities Markets
A Capacity Building Initiative of SEBI

INVESTOR EDUCATION WEBINARS

INVESTOR₹ edu Bytes

Empowering Investors Through Knowledge

June 1-15, 2026

1) **Mutual Fund Investor Onboarding Made Simple**
   By: Monali Chitnis

2) **Building Your Nest Egg : How to grow and multiply your pre-retirement savings**
   By: Renu Maheshwari

3) **Basic Concepts of Savings, Investments & Returns**
   By: Dr K Rajendra Prasad

4) **KYC & SIP Setup: A Step-by-Step Guide**
   By: Vikram Sharma

5) **Conflict Free Portfolio: Choosing investments that put you first**
   By: Renu Maheshwari

6) **Digital frauds and their safeguard**
   By: Dr. Ajeet Kumar Mauryaa

7) **Essential Features of Mutual Fund Transactions**
   By: Manish Dangra

*A fortnightly series offering quick, engaging insights from investor education webinars.

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Key Takeaways[1]

June 1-15, 2026

1. Mutual Fund Investor Onboarding Made Simple

Speaker: *Monali Chitnis*, *Vice President & Head Ops*

Context: This session aimed to enhance investors' knowledge of the simplified mutual fund onboarding process, emphasizing key considerations for a smooth and seamless experience. It also highlighted the benefits of online access for effective tracking and management of Mutual Fund investments.

❖ *Session Highlights:*

- Provided a step-by-step walkthrough of the Mutual Fund onboarding journey, focusing on the key requirements essential for a seamless process.
- Highlighted the benefits of digital onboarding, including faster processing, greater efficiency, and enhanced convenience.

✅ *Key Takeaways:*

- Completion of KYC registration with a KYC Registration Agency (KRA) is a mandatory prerequisite for onboarding.
- Investors should carefully select their tax status and mode of holding and provide other essential details, such as contact information, bank details, FATCA information, and nominee details.
- Leveraging an MFU CAN (Common Account Number) enables a streamlined experience for investment execution, folio valuation tracking, and efficient transaction management across various mutual funds.

🔗 Recording of Webinar Link

2. Building Your Nest Egg: How to grow and multiply your pre-retirement savings

Speaker: *Renu Maheshwari, Certified Financial Planner & SEBI RIA*

Context: The session focused on understanding the realities of retirement in India and building a retirement corpus through disciplined saving, inflation-aware planning, and long-term investing.

❖ *Session Highlights:*

- Used the case study of Anurag and Sheetal to estimate retirement needs and retirement corpus requirements.

[1] The views expressed in Edubytes are those of the speaker(s) and do not represent the views of NISM. This initiative is part of investor education and should not be considered financial or investment advice.

- Demonstrated the impact of inflation, showing how expenses can increase significantly over time.
- Reviewed retirement investment options, including Mutual Funds, NPS, PPF/EPF, and annuities.

✅*Key Takeaways:*

- Retirement planning should begin early to reduce the savings burden.
- Inflation is a major challenge and must be factored into retirement calculations.
- Defining a clear retirement corpus target helps convert retirement goals into an actionable savings plan.
- Consistent SIP investing and the power of compounding are essential for long-term wealth creation.
- Successful retirement planning requires disciplined financial behaviour and appropriate investment choices.

🔗 **Recording of Webinar Link**

3. Conflict Free Portfolio: Choosing investments that put you first

Speaker: *Renu Maheshwari, Certified Financial Planner & SEBI RIA*

Context: The session focused on building a goal-based, conflict-free portfolio. The session explained how different investment products, asset allocation strategies, and retirement risks work together to support long-term retirement goals.

❖ *Session Highlights:*

- Introduced the concept of a conflict-free portfolio driven by financial goals, asset allocation, and clearly defined product roles.
- Discussed the role of various investment products, including fixed deposits (FDs), Employees' Provident Fund (EPF), Public Provident Fund (PPF), National Pension System (NPS), mutual funds, real estate, and gold.
- Explained portfolio construction strategies for both the pre-retirement and post-retirement stages.
- Covered key retirement risks, including inflation, longevity, healthcare expenses, and sequence-of-returns risk.

✅*Key Takeaways:*

- Start with financial goals and asset allocation rather than product selection.
- Pre-retirement investing requires a disciplined focus on growth, while post-retirement investing requires a disciplined focus on generating income.
- Inflation and longevity can significantly impact retirement planning outcomes.
- Every investment product should have a clearly defined role within the portfolio.
- Regular monitoring and portfolio rebalancing are essential to keep retirement plans on track.

🔗 **Recording of Webinar Link**

4. Digital frauds and their safeguard

Speaker: *Dr. Ajeet Kumar Mauryaa, Assistant Professor - Hindu College*

Context: To educate participants about safe digital practices and preventive measures for protecting personal and financial information.

❖ *Session Highlights:*

- Discussed common digital frauds such as phishing, OTP scams, fake links, online payment frauds, and investment scams.
- Explained precautionary measures, including creating strong passwords, verifying online requests, and using digital payment platforms safely.
- Created awareness about stock market-related scams and emphasized the importance of following regulatory guidelines and relying on verified investment sources.

✅ *Key Takeaways:*

- Participants learned never to share sensitive information such as OTPs, passwords, PINs, or banking credentials with anyone.
- They should always verify the authenticity of websites, links, phone calls, and messages before making any financial transaction.
- Participants were encouraged to stay updated on emerging fraud techniques and follow cybersecurity best practices to ensure safe digital transactions and investments.

🔗 Recording of Webinar Link **[in Hindi]**

Watch more investor education webinars:

Webinar Date	Webinar Topic and Speaker	Webinar Link
4th June 2026	**Basic Concepts of Savings, Investments & Returns** *By: Dr K Rajendra Prasad*	Click here
8th June 2026	**KYC & SIP Setup: A Step-by-Step Guide** *By: Vikram Sharma*	Click here
15th June 2026	**Essential Features of Mutual Fund Transactions** *By: Manish Dangra*	Click here