#### A ONE DAY NATIONAL WORKSHOP

on

Financial Planning and Wealth Managemen

19 August 2024



#### **PRESIDENT**

Dr.V.Anantha Lakshmi Principal

#### **VICE-PRESIDENT**

Smt. M.Suvarchala Vice-Principal

#### **CONVENER**

Ms. G. Pavani Devi HOD-Dept. of Economics

Organized by

**DEPARTMENT OF ECONOMICS** 



### A BRIEF REPORT ON A ONE DAY NATIONAL WORKSHOP



On

"Financial Planning and Wealth Management"

19 August 2024



#### Organized by

#### **DEPARTMENT OF ECONOMICS**

### A.S.D. GOVT. DEGREE COLLEGE FOR WOMEN (AUTONOMOUS)

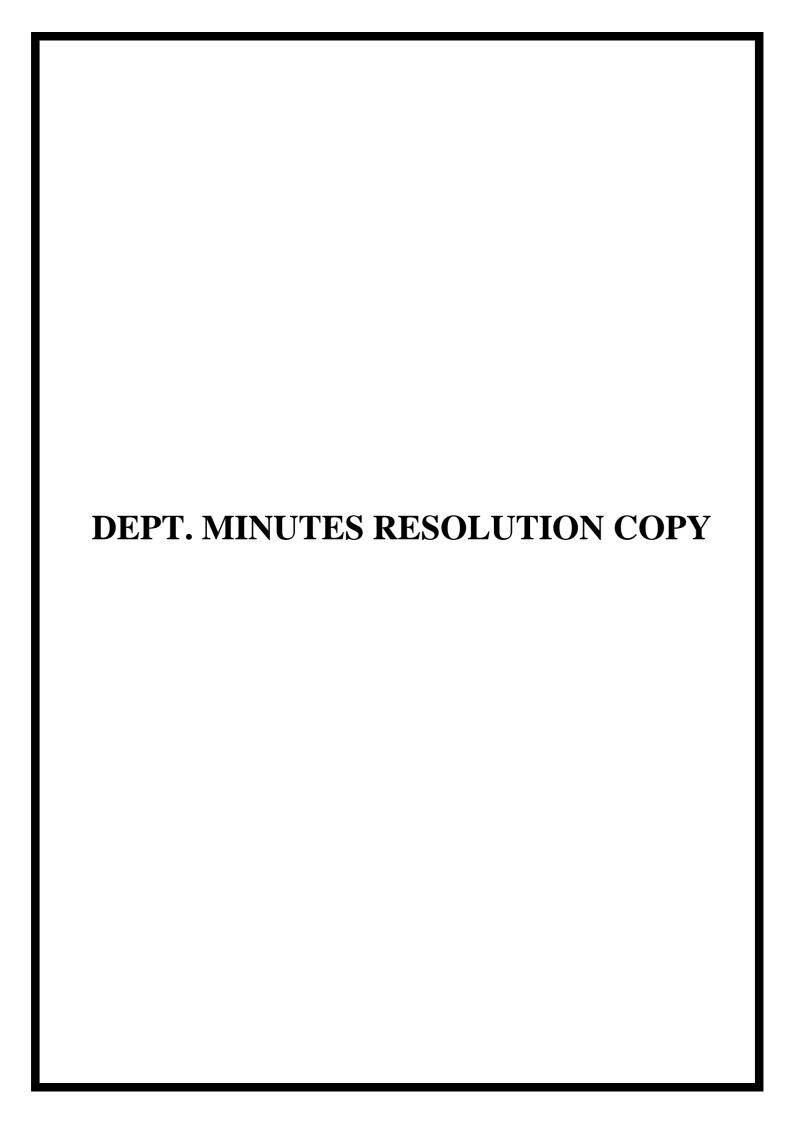
(Re Accredited with 'B' Grade by NAAC) Affiliated to Adikavi Nannaya University Jagannaickpur, Kakinada - 533002 Ph.: 0884-2378446

Website: www.asdgdcw.ac.in

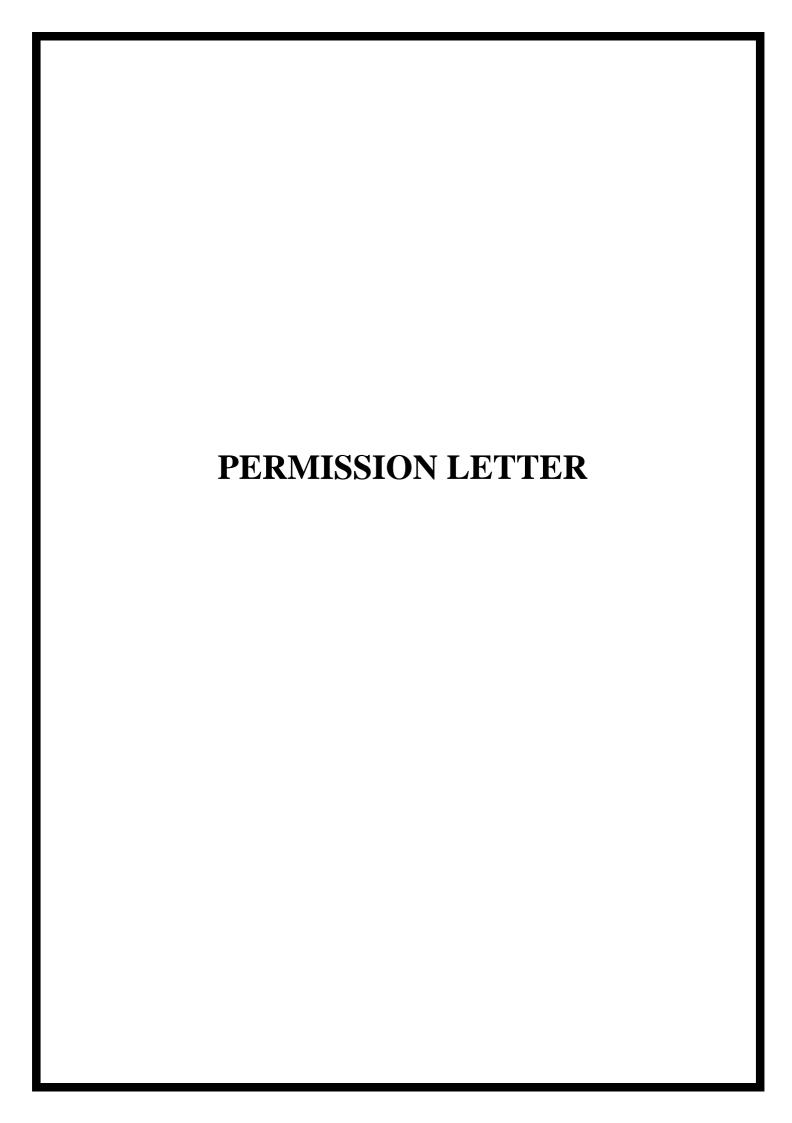
E-mail: csworkshop2024@asdgdcw.ac.in

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01-08-2024 Department of Economics Meeting held on 01-08-2024 The faculty members of department of economics met on 01-08-2024 in the department to disuss the following gorda. Agenda? and wealth monagement" Resolution: from Bajoj capital, it is resolved to Conduct the Norkshop on 09-08-2024. E. It is also resolved that the workshop is Conducted for both Students and faculty members. The maning sonion will be Conducted for the Students and afternoon session for the teaching and non-teaching Staff members. 31 Et is further resolved that request to be made to puncipal to against the workshop on the said date in the Seminar Hall. Letheret in thange Foculty



From
G.Pavani Devi
Lecturer In-Charge,
Department of Economics,
A.S.D. Govt Degree College for Women (A),
Kakinada.

To
The Principal
A.S.D. Govt Degree College (W) (A),
Kakinada.

#### Respected Madam,

**Sub : A.S.D. G.D.C.W(A) -** Department of Economics – Request to approve the Proposal of organizing A One-Day national Workshop on 'Financial Planning and Wealth Management' Dt. 19- 08-2024 -Reg.

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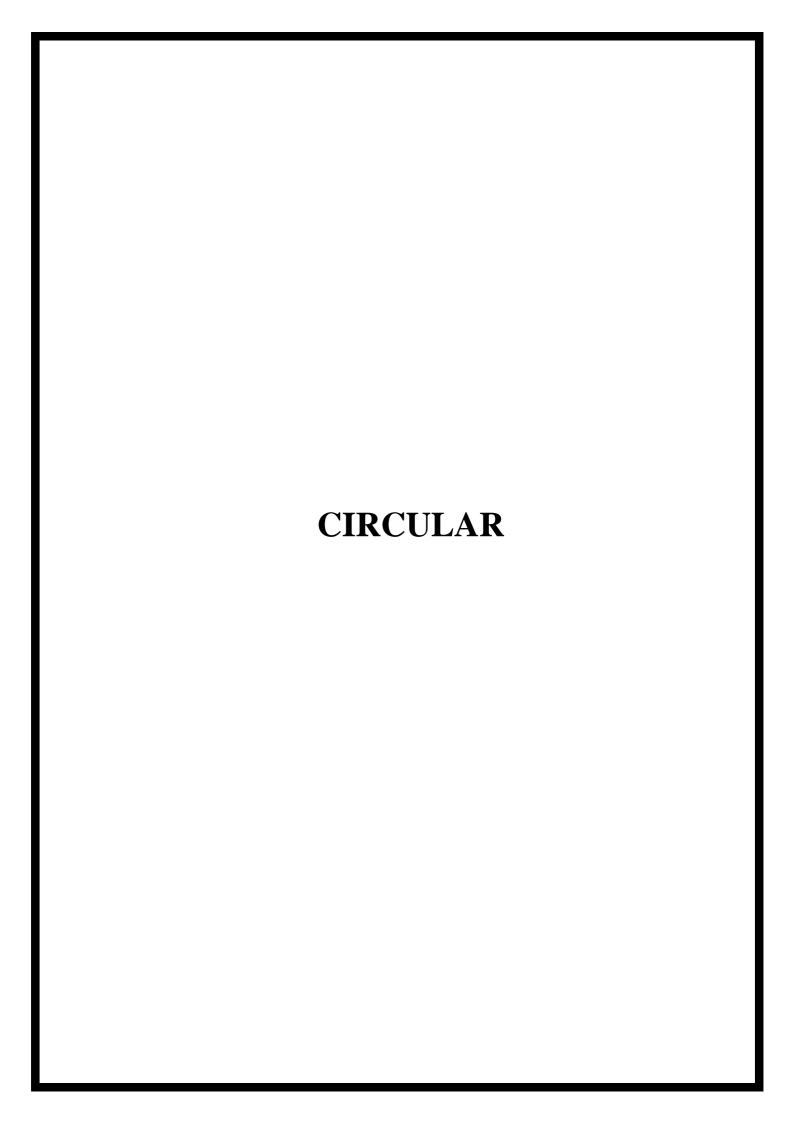
I submit that the Department of Economics is planning to organize A One-Day National Workshop on 'Financial Planning and Wealth Management' Dt. 19- 08-2024. which is beneficial to both the Faculty and the students. In this regard, I request you to kindly give us permission to organize the Workshop.

Thanking you, Madam.

Place: Kakinada Date: 02-08-2024

Yours faithfully,

(G.Pavani Devi)



#### A.S.D.GOVT.DEGREE COLLEGE FOR WOMEN (A)

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#### **DEPARTMENT OF ECONOMICS**

#### **CIRCULAR**



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**DEPARTMENT OF ECONOMICS** wishes toarrange a A One-Day National Workshop

on

Financial Planning and Wealth Management"

19-08-2024

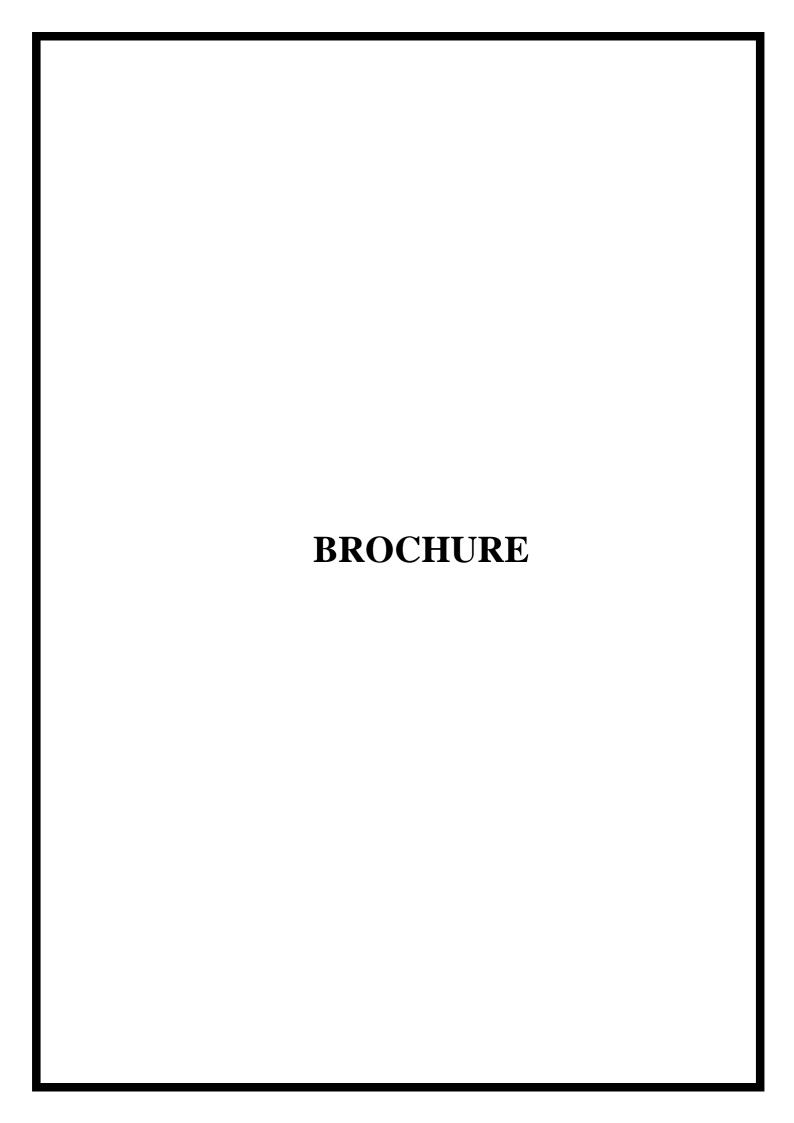
in Seminar Hall

In this connection all the students are informed to attend the Workshop and make the best out of it.

**In-Charge of the Department** 

**Principal** 

V Ananta Lathur



# ABOUT THE COLLEGE

of an champions equality. The College offers 14 UG A.S.D Government Degree College for Women Prosper'. The idea came up with the inspiring a Woman's education is the Women for having learning ;it's a community that celebrates Kakinada started with the Motto 'Sthree Vidya Pravardhataam' -'Women Education Shall Gandhi :"A Man's education of a Family", and it is the only Autonomous Status in the Coastal belt of A.P. Our institution is more than just a place of creativity, being the education Jagannaickpur, Government College for encourages words of Mahatma Honours programmes-(Autonomous), education Individual, diversity,

B.A. (Economics),

B.A. (Political Science)

B,A (History)

B.Com. (Computer Applications), B.Com. (General)

B.Com. (BFSI)

B.Sc. (Mathematics) B.Sc. (Physics)

B.Sc.(Computer Science) B.Sc.(Chemistry)

B.Sc. (Botany)

B.Sc. (Home Science) B.Sc. (Zoology)

M.A. (Telugu) & M.Com (EM) offers 2 PG Programmes: B,Sc, (Microbiology) and

# **ABOUT THE DEPARTMENT**

vision of becoming the leading center of economics is committed to providing its The Department of Economics was The vision of the Department is "With the students with the skills and expertise needed for success in the field of established in the year 1962 as one of the Conventional Courses in the College. economic education, the department of economics"



a unique approach that practical applications, all while staying rooted Over the years, the Department of Economics seamlessly integrates theoretical insights with in foundational principles. The faculty members dedicated to ensuring that students develop a robust understanding of economic and seminars that address current trends and concepts by organizing a variety of workshops developments in the field of Economics. cultivated

# **ABOUT THE WORKSHOP**

The Workshop on Financial Planning and Wealth essential skills and knowledge for managing retirement planning, this workshop offers real-world applications, empowering attendees Management aims to equip participants with Covering a range of topics from budgeting and nvestment strategies to risk management and enhance financial literacy. Led by industry experts, the provide hands-on experience and to make informed financial decisions and growth. This workshop is ideal for individuals to improve their financial planning personal and professional finances effectively. capabilities and secure their financial future. stability practical insights and tools to long-term financial achieve seeking

# A.S.D.GOVT. DEGREE COLLEGE FOR WOMEN (A)



(RE-ACCREDITED WITH '8' GRADE BY NAAC)
(RAJAHMUNDRY)(AFFILIATED TO ADIKAVI NANNAYA UNIVERSITY, RAJAHMUNDRY)

# A One Day National Workshop

## **WEALTH MANAGEMENT** FINANCIAL PLANNING

09 August 2024



Organized by

# **Department of Economics**

## Chief Patron

Hon'ble Commissioner of Collegiate Dr.Pola Bhaskar, IAS Education-AP Mangalagiri

### Patron

President

RJDCE Zone-I & II Dr.S.Sobharani Krishna

Rajamahendravaram

Dr. M.Suvarchala Vice-President Vice-Principal

#### Dr.V.Anantha Lakshmi Lecturer In-charge Ms. G.Pavani Devi Principal Convener

Dept. of Economics

## Organising Secretary

Lecturer in Economics Dr. K.Yamuna

## Advisory Committee

Dr.G.Anitha Ms.M.Vasantha Lakshmi IQAC Coordinator Dept. of Zoology

Academic Coordinator Dr. K.Lavanya

Dept. of Home Science

Academic Coordinator

Dept. of English Dr. P.Sanjotha

UGC & RUSA Coordinator Dept. of Home Science

# Oragnising Committee

Ms. Y.Sitamahalakshmi Lecturer incharge of History

Inauguration :10 AM to 11 AM

Workshop Schedule:

: 11 AM to 1 PM : 2 PM to 3 PM

: 4 PM to 5 PM 3 PM to 4 PM

Valedictory Session 3 Session 2 Session 1

> Ms. P.V.Bhuvaneswari Devi Lecturer in Political Science

## Resource Persons:

Associate Vice President & Regional Head **Financial Prosperity Centre** PANDI RAMANATHAN Bajaj Capital, Delhi

### Bajaj Capital, Kakinada Marketing zonel P. SRINU BABU

Bajaj Capital, KAKINADA **Branch manager** M RAJESH

# Objectives of the Workshop

- Help participants understand key financial saving, budgeting, concepts like investing.
- Teach attendees how to build and manage investment portfolios that suit their goals and risk levels.
- Show practical ways to create and stick to a budget that supports their financial goals.
  - Provide guidance on saving for retirement and choosing the right retirement accounts.
- money and assets through proper planning Educate participants on how to protect their and insurance.

### **Contact Us for Registration** 94925 08197

9502520841

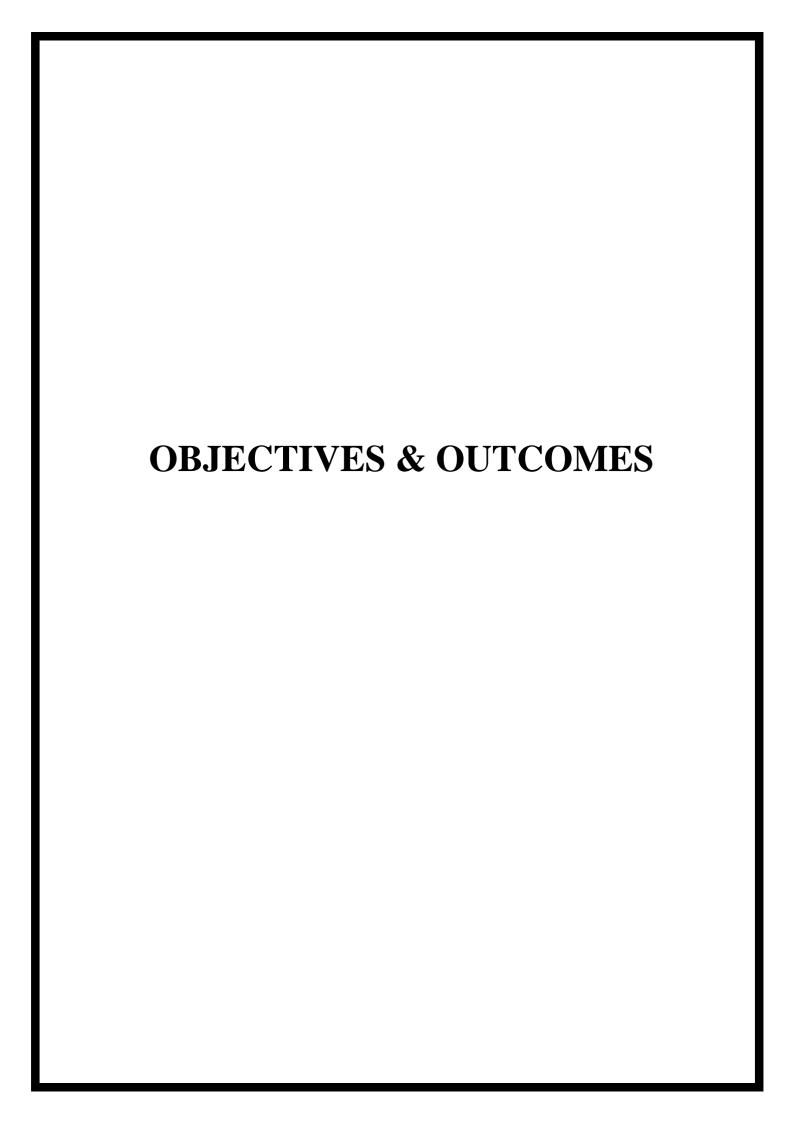
email: hod.economics@asdgdcw.ac.in www.asdgdcw.ac.in

Near Fire Station, Jagannaickpure,

Kakinada-1.



# **No Registration Fee**



#### A.S.D.GOVT. DEGREE COLLEGE FOR WOMEN

**(A)** 

(Re-Accredited with 'B' Grade by NAAC) (Affiliated to Adikavi Nannaya University)Jagannaickpur, Kakinada.

### **DEPARTMENT OF ECONOMICS One-Day National Workshop on**

### "Financial Planning and Wealth Management" 19 August 2024

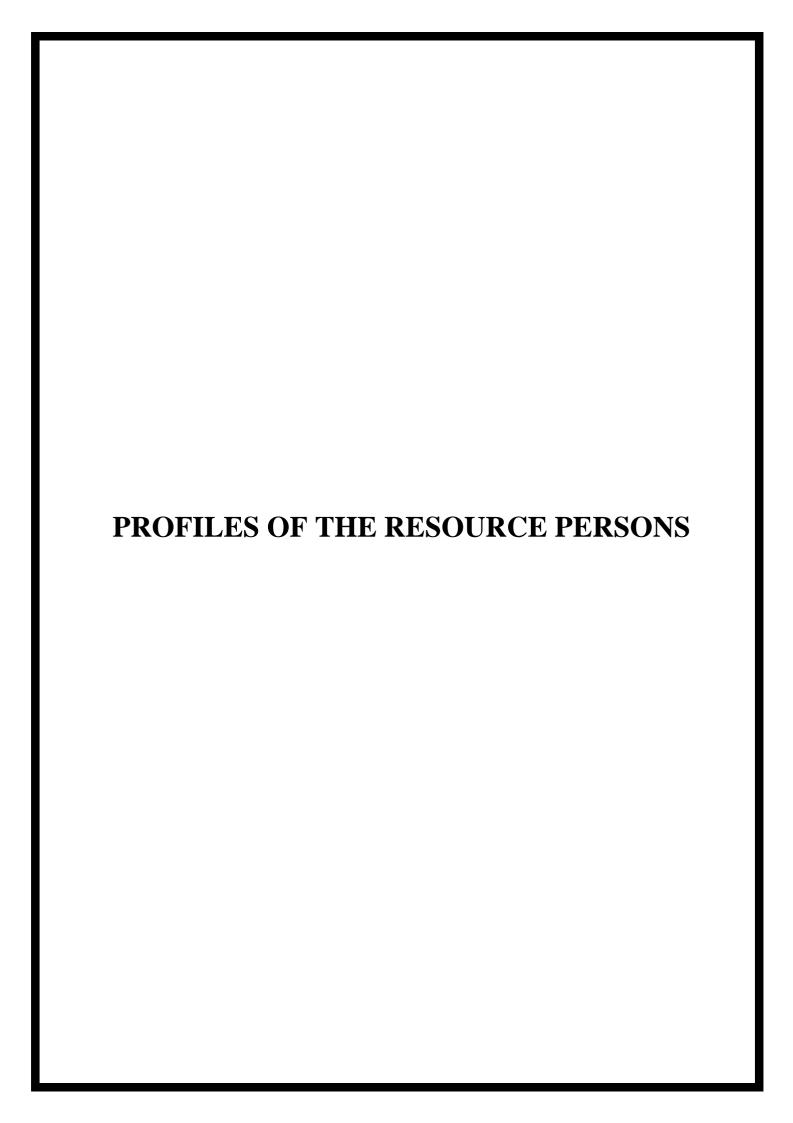
#### **Objectives of the Workshop:**

- **Enhance Financial Literacy:** To equip participants with a strong foundation in financial planning concepts, tools, and strategies.
- **Develop Wealth Management Skills:** To provide practical knowledge and skills necessary for effective wealth creation, preservation, and growth.
- **Understand Investment Options:** To explore various investment avenues, including stocks, bonds, mutual funds, real estate, and insurance, analyzing their risks and returns.
- **Promote Financial Well-being:** To empower individuals to make informed financial decisions, achieve their financial goals, and secure their financial future.
- **Foster Networking:** To create a platform for participants to interact with financial experts, share insights, and build professional connections.
- Address Contemporary Challenges: Depending on the workshop's focus, it could delve into specific financial challenges like retirement planning, tax optimization, or estate planning.
- **Tailor to Target Audience:** Objectives may be customized based on the participants' background, such as students, young professionals, or entrepreneurs.
- **Incorporate Case Studies:** Practical case studies and real-world examples can be used to illustrate financial planning principles and their application.
- **Ethical Considerations:** Emphasize the importance of ethical practices and fiduciary responsibility in financial advisory services.

#### **Learning Outcomes of the Workshop:**

#### **Outcomes of the Workshop:**

- Increased Financial Awareness: Participants gained a deeper understanding of financial planning principles, including budgeting, saving, investing, and risk management.
- Improved Financial Decision-making: Attendees were better equipped to make informed financial choices aligned with their personal goals and risk tolerance.
- Enhanced Investment Acumen: Participants developed the skills to analyze investment options, assess their suitability, and construct a diversified portfolio.
- Greater Confidence in Financial Matters: The workshop empowered individuals to take control of their finances and work towards financial security.
- Networking Opportunities: Participants had the chance to connect with financial professionals, fostering Development of a Financial Plan: Participants may have been guided to create a personalized financial plan outlining their goals, strategies, and action steps.
- Access to Resources: The workshop provided access to valuable resources like financial planning tools, templates, or recommended readings.
- Continuing Education: It inspired participants to pursue further learning in finance or seek professional financial advice.
- **Community Impact:** By promoting financial literacy, the workshop contributed to improved financial well-being within the community.



#### Profile of Resource Person: Pandi Ramanathan

#### Regional Manager - AVP | Bajaj Capital Ltd

#### **Professional Summary:**

Pandi Ramanathan is an accomplished Regional Manager and Associate Vice President (AVP) at **Bajaj Capital Ltd**, a leading player in the financial services sector. With a wealth of experience in wealth management, financial planning, and investment advisory, Pandi has demonstrated a proven track record in driving business growth and enhancing client relationships across diverse regions.

As a strategic leader in Bajaj Capital, Pandi is responsible for overseeing the performance and operations of multiple branches within his region. His leadership and expertise span areas such as asset management, risk assessment, and client relationship management. His ability to combine deep market knowledge with customer-centric solutions has earned him a reputation as a trusted advisor and a go-to leader for both clients and teams alike.

Pandi's strong focus on developing innovative strategies for market penetration and business expansion has led to the successful implementation of new initiatives that have significantly contributed to the organization's bottom line. His leadership style emphasizes collaboration, transparency, and operational efficiency, helping to foster a high-performance culture across the regional network.

#### **Key Areas of Expertise:**

- Wealth Management & Financial Planning
- Strategic Business Development & Regional Growth
- Client Relationship Management & Retention
- Investment Advisory & Portfolio Management
- Cross-functional Team Leadership
- Risk Management & Financial Analysis
- Sales & Performance Optimization
- Leadership Development & Talent Management

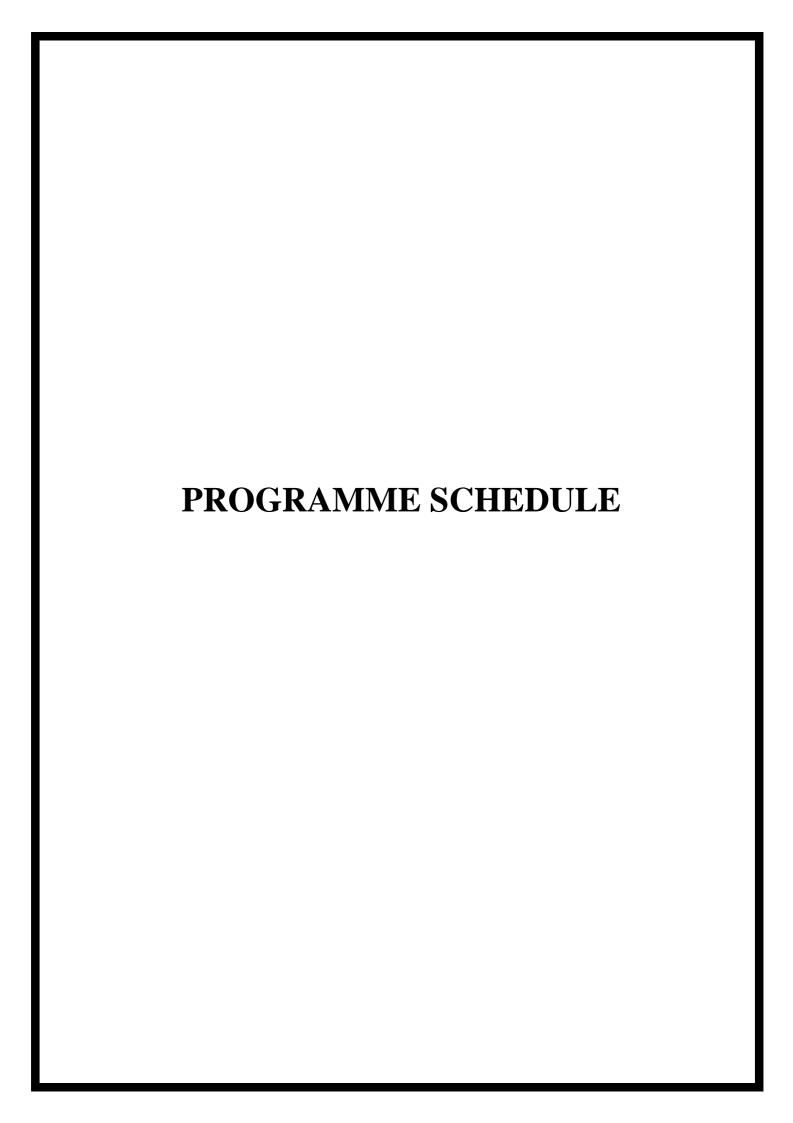
#### **Professional Experience:**

#### Bajaj Capital Ltd | Regional Manager – AVP- 2005-Present

- Leading the regional operations and managing a diverse team across multiple locations.
- Developing and executing business strategies aimed at expanding the firm's footprint and increasing revenue streams.
- Offering financial solutions to clients, helping them build and manage wealth through a variety of investment vehicles.
- Overseeing operational efficiencies, ensuring that all services are in line with Bajaj Capital's high standards of quality and client satisfaction.
- Mentoring junior managers and sales teams to drive high levels of performance and customer satisfaction.

#### **Education & Certifications:**

• **[BSc, Mathematics]**, [Madhurai Kamraj University- 2001)





#### A.S.D.GOVT. DEGREE COLLEGE FOR WOMEN (A)

#### KAKINADA.

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#### DEPARTMENT OF ECONOMICS

#### **One-Day National Workshop**

on

#### Financial Planning and Wealth Management

#### **Programme Schedule**

9.30 AM to 10.00 AM : REGISTRATION

10.00 AM to 10.30 AM : Inauguration & Keynote Address

**SESSION-I** 

10.30~AM~to~1:00~PM : Financial Planning Basics and Financial Planning

Resource Person: M.Rajesh

Branch manager Bajaj Capital

KAKINADA

**SESSION-II** 

02.00 PM to 03.00 PM : Investment Strategies

Resource Person: P. SRINU BABU

Marketing zonel Bajaj Capital,

Kakinada.

3.00 PM to 3.15 PM : Break

**SESSION-III** 

3.15 PM to 4.15 PM : Tax Planning: Various investment Avenues

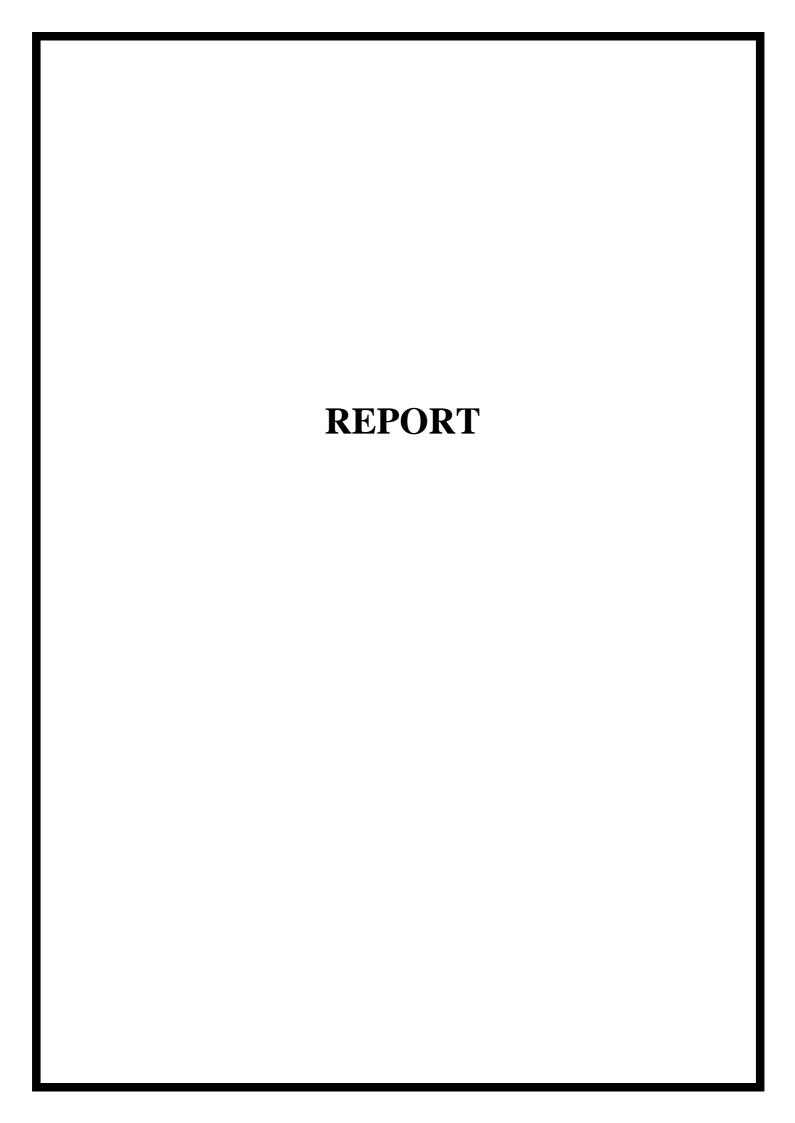
Resource Person: PANDI RAMANATHAN

Associate Vice President & Regional Head Financial Prosperity Centre Bajaj Capital, Delhi

4.15 PM to 4.30 PM : Feedback by students

4.30 PM to 6.00 PM : Distribution of Certificates to participants &

Valedictory



#### A REPORT ON

#### One Day National Workshop on Financial Planning and Wealth Management

Organized by: Department of Economics, A.S.D Government Degree College for Women

(Autonomous), Kakinada

**Date:** 19-08-2024 **Introduction** 

The Department of Economics at A.S.D Government Degree College for Women (Autonomous), Kakinada, successfully hosted a One Day National Workshop on Financial Planning and Wealth Management on 09-08-2024. The workshop aimed to provide students and faculty members with valuable insights into personal finance, investment strategies, and tax planning. 99 Students and 38 Teaching and non-teaching staff benefited from the workshop.



Dr. V. Anathalakshmi, Principal ASD Government Degree College, giving the inaugural address



M. Rajesh, Branch Manager, Bajaj Capital, Kakinada taking the session to students



Short video Screening on importance of Financial Planning for women



Interactive games on testing the financial literacy of students



Afternoon session for the Teaching and non teaching faculty





Pandi Ramanathan, Associate Vice President & Regional Head, Financial Prosperity Centre, Bajaj Capital, Delhi Expalining various investment avenues for teaching and Non teaching Faculty



#### **Sessions Brief Inauguration**

The workshop was formally inaugurated at 10 AM. In their inaugural address, the chairperson of the event, Dr. V. Ananthalakshmi madam, Principal ASD Government Degree College, emphasized the importance of financial literacy in today's world and highlighted the need for individuals to make informed financial decisions.

**Session 1: Financial Planning Basics** and **Financial Planning for Students** M. Rajesh, Branch Manager, Bajaj Capital, Kakinada, conducted a session specifically tailored for students. He covered topics such as:

- **Budgeting for students:** Managing expenses while pursuing education.
- Saving for future goals: Planning for expenses like higher education or travel.
- Understanding credit cards and loans: Responsible use of credit facilities.
- **Investing for students:** Exploring investment options suitable for young people.

fundamental concepts of financial planning, including:

- **Setting financial goals:** Identifying short-term and long-term financial objectives.
- Creating a budget: Tracking income and expenses to manage finances effectively.
- Managing debt: Strategies for reducing and eliminating debt.
- Saving and investing: Understanding different investment options and their risks.

#### Session 2: Investment Strategies: 2 PM to 3 PM

was conducted by Pandi Ramanathan, Associate Vice President & Regional Head, Financial Prosperity Centre, Bajaj Capital, Delhi. Mr. Ramanathan covered. He explored various investment

avenues such as:

- Stocks: Investing in shares of publicly-traded companies.
- **Bonds:** Investing in debt securities issued by governments or corporations.
- **Mutual funds:** Pooled investment vehicles managed by professionals.
- **Real estate:** Investing in property for rental income or appreciation.

#### **Session 3: Tax Planning**

The third session, from 3 PM to 4 PM, was led by P. Srinu Babu, Marketing Zonal, Bajaj Capital, Kakinada. Mr. Babu discussed tax planning strategies, including:

- Understanding tax laws: Knowing the applicable tax regulations and exemptions.
- **Tax-saving investments:** Identifying investments that can reduce tax liability.
- Tax implications of financial decisions: Analyzing the tax consequences of various financial moves.

#### Valedictory

The workshop concluded with a valedictory session at 4 PM, Dr. K.Yamuna, Lecturer in Economics delivered the valedictory address. She appreciated the efforts of the organizers and resource persons and emphasized the importance of financial literacy for everyone.

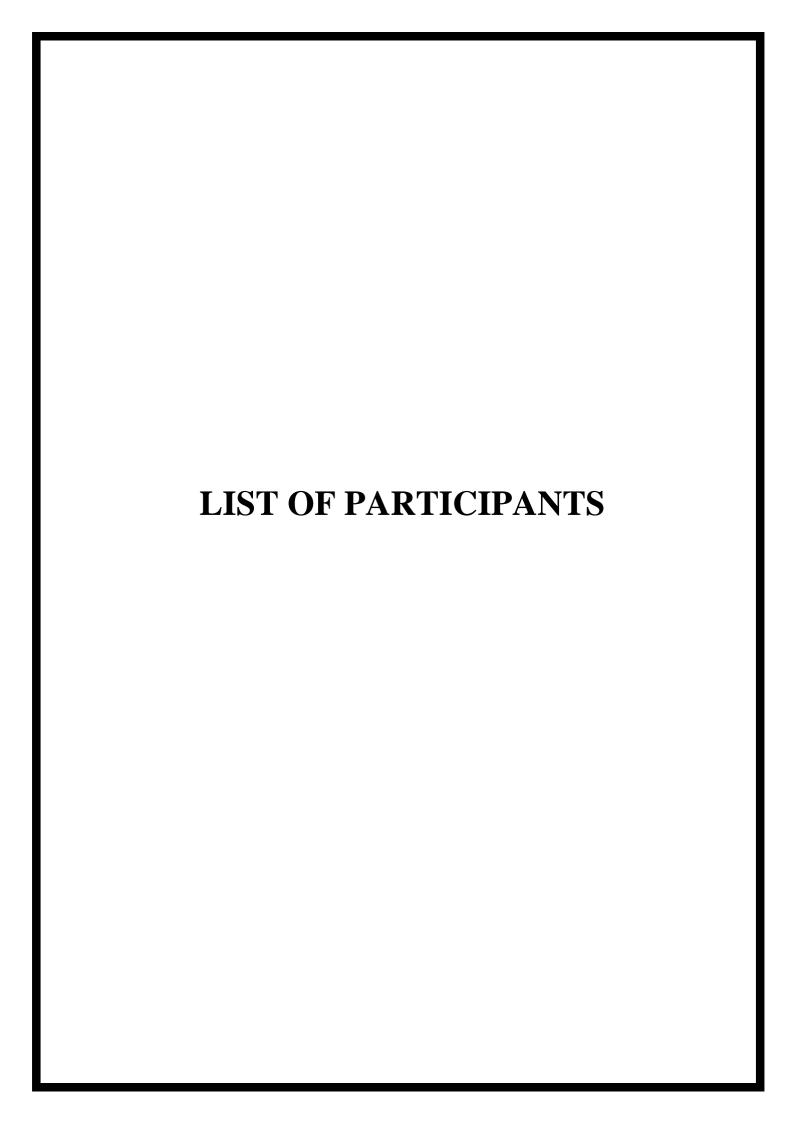
#### Conclusion

The One Day National Workshop on Financial Planning and Wealth Management was a resounding success. The workshop provided valuable insights and practical knowledge to students and faculty members, empowering them to make informed financial decisions. The Department of Economics, A.S.D Government Degree College for Women (Autonomous), Kakinada, is committed to organizing such events to promote financial literacy and empower individuals.

Convenor

**Principal** 

V Ananta lathur



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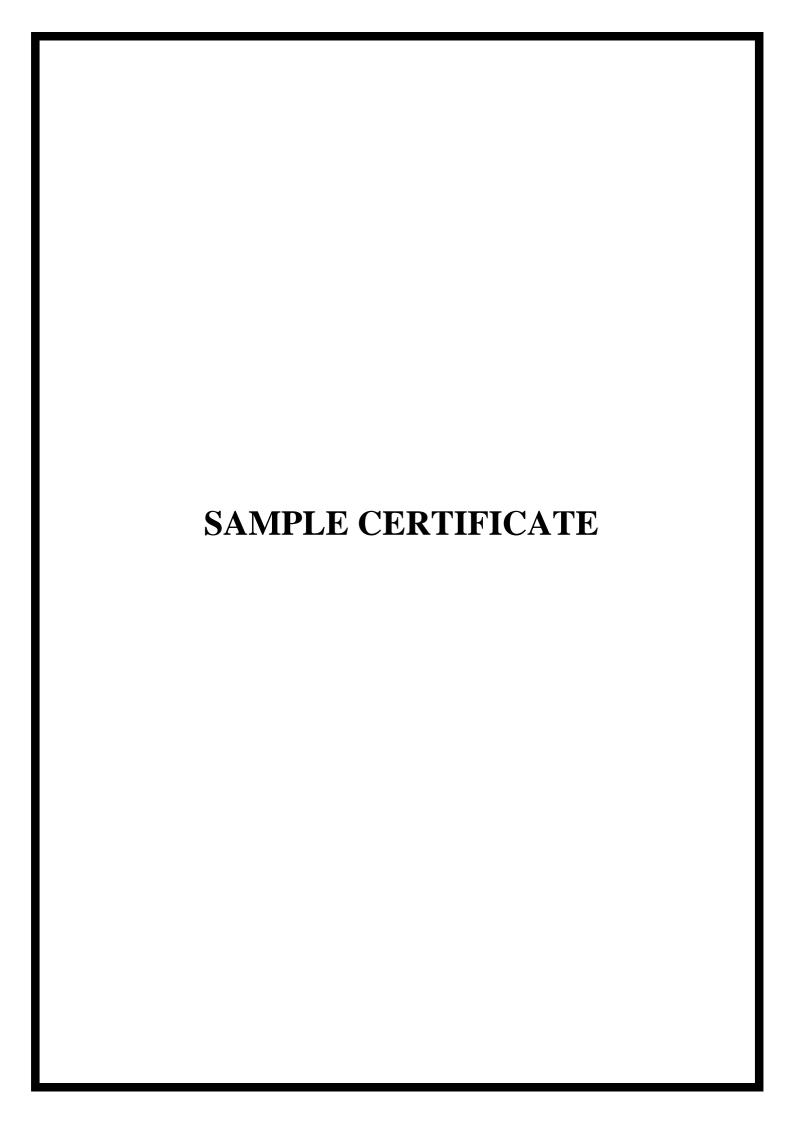
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15.	BODAPATI . VENKATA LAKSHMI	TROM (CA)	2361025@asdydew.ac.in	855996145	ch. lakshmi
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39	DANDUPROLU SANDHYA	I B. Com [Grove A	236200 @asdgdcw.ac.in	9505708887	U. Tejestraki
	UPPALAPO. VEERA LOVA LAKSHMI OURGA GAN	A II B Com Fame	2362001 @ asdad cwacin	9441632018	J. Jahnau
400	JAMINUNNISHA	1 B. CAM CRAZ	2362041@ asdgdcw.ac.in	7673998589	D. Sandhya
	HILL GYOTH KMAYT	PRIME 1	1936 SK basha @ g·mail·com	6304841478	U.V.L.L. Dwgg Gor
40.	MATTAPARTHI LIKHITHA	TT 0 . 0	236144 to asdancin ac in	9-0	SK · Sami munnis
43.	GARIKINA. NAGA KOWA	-0. 0.	2361002 D ashadow acia	0	P. Tyothismayi
79.	MALLADT, VACRIOUSHAT	TO	2361031 (a) asagacio, acin	Quinia mora	Mikha
7).	BHEEMTRE DOV. NAGAMANT		2361037 6) audgdcw.ncin	01-0-	Gikawya
10	PINAPOTHU CHAPME	The order (CA)	2361623 @ astarcura 's	770	M. voralakshni
47	RATALA ANADOHA	(0)	2361050 @ astadowar m	3540215211	B. Nagarani
48	APPADA PRT YA AMRUTHA SOT MA OSUTALT	Similar (CV)	2361052 @ asdadow as	Buss	P. Charmi
-11	TANDRAKOTA ANUCIN	1	ashortinar in ashortinar in	Menter	R. Adayla
50	KANTUMUTCH MALLESWART	I B.A (Eco)	2351013 @ asdydcwacin	9666054009	A.P.A. Soni Varehin
51	SANOADI JYOTHI	- COM (CA)	DAME A	1	K. Anusha K. Mallesulari
52.	AMBATI MADHAVI	I B. A(Eco)	2351023 @ asdgdc.w.ac.in	7078711845	K. Mallethari
53.	DONDAPATI, KUMARI	H BACCO)	2151005@asdgdcwacir	86880 50310	5. Jyothi
54	you'pe some YELTPE SANGYA MEERZA.	P. TICCO)	2351010 @ acdgdc. warin	8498045812	A.Made:
SS	CHEKKA, MANJU	11 RH E(0)	2351027 @ asdade wacin	9515978598	D. kunay?
56,	KUSUMA. SPURTHI	B. com(c.n)	2361026 @ asdad c. Waci	738349214	4. Sanya muzza
57.	VARIPILLI PAPANJALI	I BA (ELO)	235/015@ asdate in acio	802212 100	ch. Mark
78	MUMMACANT CARL	I'm B. com [CA	2361015@ asdgdcurac.in	8977650 188 9550735984	K. Spartie
20	MUMMASANI SATLAJA	I B. Com (CA)	2361010@ asigico ac in		V. Aryali
24	MOSA KANCHANA	R. B. Com [C. a]	2361040 @ argd co. ac in	7989397448	14. Sailaja
-		TO COM CCAN	and Caracac II	030105 #618	M. kanchana

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60	YELETI KALYANI KUMARI	Ist B. com C.A.	2361061@ asdydowach	9346654658	Y. Kalyeni
61	BARRE NOOKARATNAM	Put B. A (ECONOM	9351006 Backadown &	8185886990	B. Nookavatian
68.	SAPPA VEERA DEVI	I. B. (OM (CA)	2361054@asagdcw.acim	9701468691	S. Viera deust.
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64.	YESURI DEVI	Ind BOMCCA)	8361062@ astgdawaga	9490560698	y. Delle
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70.	Vineela. BARRE	IJ BA (HEP)	2014007 @ asygk w. ina	9100716688	10.48
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72	KAKADA- RAHYA	III BA (HEP)	2214015 @asdopkwin	8978596488	Poylak
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74.	PADALA . DEVI	(II) B.A (HEP)	2214005@ assigacw.fn	83175 79 903	P. Desi.
75	MOHAMMAD. EGRA MAYEEN	B.A (HEP)	2214003 @ asagacw. 9n	9347051433	MP Zguarayo
76.	THOTA . SATYA SRI	ILBA (HEP)	2214031@ asagacwin	6302094249	T. Satga Sin
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921	GELLA, JYOTHI	II (BIA HEP)	2214013 @ asd godcmin	9652796695	Gr. Trathi
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66.	VEDURUPAKA LAKSHMI DEVI	I.B.com[c.A]	2361059@asdgdcw.ac.in	7989305916	V. L. Devi
67	NARAM NAGALAKSHMI	I. B. com (CC.A)	2361042 @ asaga cw. 11	9391740385	al abgololylui
68	LANKE, GANGOTRI	TUBA (HEP)	22614020@ asaga Cw.acin	9666392293	L. Giangotri
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70.	Vineela BARRE	IJ BA (HED)	2014007@asdgx10.ina	9100716688	10.48
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72	KAKADA PAMYA	JUBA (HEP)	2214015 @assigneria	8978596488	Payak
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1 74.	PADALA . DEVI	(III B.A (HEP)	2214005@ assigacw.fn	83175 79 903	P. Deis.
75	MOHAMMAD. EGRA MAYEEN	1 B.A (HEP)	2214003 @ asagacw. 9n	9347051433	MP Lguaraga
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92	GELLA, JYOTHI	II (BIA HEP)	2214013 @ asd gdcmin	9652796695	On Tyathi
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97. 11 BA (Economics)	Name of the participant  CHOKKA NAVYA LAKSHMI  CHOKKA NAVYA LAKSHMI  CHETT OF THE CHINNANT HARSHITHA  GUTALA SIVASWATHI  CHEKA MANJU  ACHANTA HIMA BINDU  GUDAPUVAIDSA KARUNA SRI  KARI MIHANA DURGA  BONBADA SHAKECNA  CHAGANTI LAKSHMI ONI SI  VANKA DURGA MANASA	2361001 @ asdydcw.ac.in 2361002 @ asdydcw.ac.in 2361026 @ asdydcw.ac.in 2361026 @ asdydcw.ac.in 2351001 @ asdydcw.ac.in 2351009 @ asdydcw.ac.in 2362005 @ asdydcw.ac.in 2362005 @ asdydcw.ac.in	Thora number  84988 97998  9398455594  9515234511  7386349241  9573419234  7181486468  8499004014  630419097  9191018874  9381029140	Signature  ch paysa lafylim  6. Chimori barshita  ch G. Siasuathi  th manje  A telmabandu  G. Kasunatora  K. Mehara aliga  B. Hakrina  Ch. Jakin  V. Durga Manasa
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### Re Accredited by NAAC with 'B' Grade in Cycle III (Affiliated to Adikavi Nannaya University, Rajahmahendravaram)

#### **CERTIFICATE**

				attended and participated
	-			anised by the Department of hra Pradesh on 09-08-2 <mark>024</mark>
Dr.K.Yamuna Irganising Secretary	G.Pavani Devi Convener	Ms.M.Vasantha Lakshmi IQAC Coordinator	Dr.M.Suvarchala Vice Principal	Dr.V.Ananthalakshmi Principal