



EMERGING SECTORS AND INVESTING IMPLICATIONS

WITH RAJEEV THAKKAR AND RAUNAK ONKAR

05 - 06 JULY, 2025



FLAME
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ABOUT THE FLAME INVESTMENT LAB

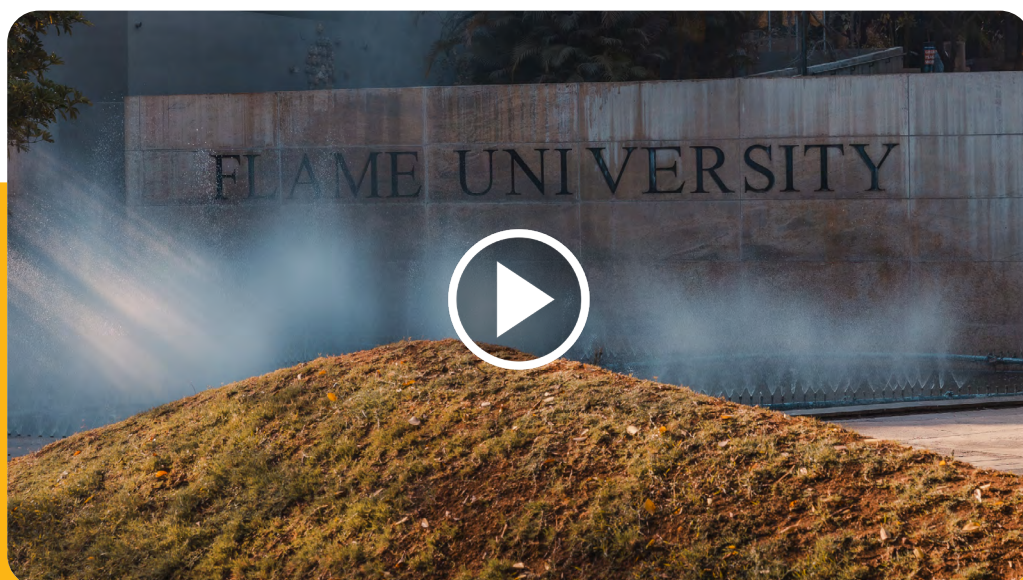
FLAME was founded with the concept of interdisciplinary education as its cornerstone. FLAME celebrates ideas, cherishes diversity, and strives to deliver an academic experience that fosters intellectual curiosity, a critical thought process, self-reflection, leadership and teamwork skills, a sense of commitment and professionalism and a heightened sensitivity to one's sociocultural environment. FLAME aims to provide an interdisciplinary platform of education by propagating different models and paradigms through, but not limited to, history, philosophy, political sciences, psychology, business, economics, mathematics and finance.

As part of its endeavor to constantly redefine education, FLAME inducted the FLAME Investment Lab (FIL), an initiative that strives to deliver the concepts and decipher

the art of value investing to interested students. FIL believes in the dictum "invest in yourself". It provides tools for self-learning and acquiring knowledge, constantly striving for intellectual stimulation and asking questions. FIL strives to widen your horizons, aiding you to connect the dots within seemingly disparate information. FIL truly believes that the best investment is investing in yourself. As Socrates has said, "I cannot teach anybody anything. I can only make them think."

After successfully hosting multiple FLAME Investment Lab programs, we are excited to announce the '**FLAME Investment Lab – Emerging Sectors and Investing Implications**' program with **Rajeev Thakkar and Raunak Onkar**, from July 05 - July 06, 2025.

OUR PHILOSOPHY



SPEAKERS

RAJEEV THAKKAR

Possessing over three decades of experience in various segments of the capital markets such as investment banking, corporate finance, securities broking and fund management, he is currently the Chief Investment Officer and Director at PPFAS Mutual Fund.

His association with PPFAS Limited (The sponsor of PPFAS Asset Management Company Ltd.) began in 2001. He was appointed the Fund Manager for the erstwhile flagship strategy of the Portfolio Management Service, titled "Cognito" in 2003.

He is a strong believer in the school of "value investing" and is heavily influenced by Warren Buffett and Charlie Munger's approach. Apart from his technical ability, what distinguishes him from many others is his ability to stand his ground and remain unflappable during difficult times.

He is a regular contributor to Mint newspaper and has also appeared on business channels such as CNBC, ET Now and NDTV Profit.

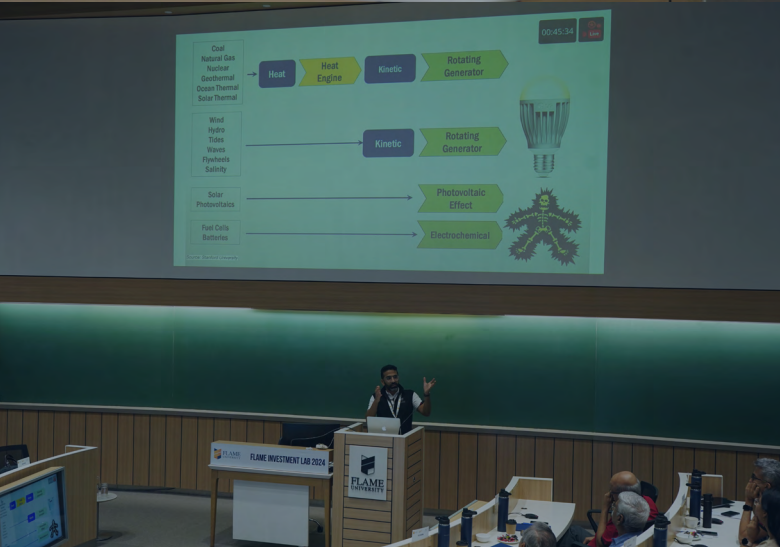
He is a qualified Chartered Accountant, Cost Accountant and CFA Charterholder.



RAUNAK ONKAR

Raunak Onkar is a Co-Fund Manager & the Research Head at PPFAS Mutual Fund.

After his Bachelors in IT and an MBA in Finance, Raunak started his capital markets journey with PPFAS, over a decade ago. As an analyst, he covers a variety of businesses & sectors and is a regular speaker at PPFAS' Monthly Event, Financial Opportunities Forum series on Youtube. (<https://ppfasfof.com/>)





PROGRAM OUTLINE

Theme: Outsourced Electronics Manufacturing

1. What is Electronics Manufacturing?
 - Market Size by Products
2. History of in-house manufacturing vs Outsourced manufacturing
 - When did it start?
3. International Success and Failure with examples
4. Current State of Global Electronics Manufacturing
5. What's happening in India?
 - Imports and Import Substitution
 - Forex
 - Employment
 - Exports
 - Geopolitical Position
6. What's needed in India to become a hub for Outsourced Electronics Manufacturing?
 - Progress in India
 - Road map for India
 - PLI and Policy Initiatives
7. Key players in India
 - Strategy
 - Execution
 - Examples

Disclaimer: Businesses discussed during the program are for illustrative purposes only and not a BUY / SELL / HOLD Recommendation.



WHO SHOULD ATTEND?

Prior knowledge of electronics manufacturing processes or supply chain dynamics is useful but not necessary.

Anyone who wishes to understand the current state of electronics manufacturing globally and in India, along with the progress and roadmap for India to become an outsourced electronics manufacturing hub, should attend. This course will also be valuable for those interested in the broader impact on global trade, foreign exchange, employment generation, and geopolitical positioning.



SELECTION CRITERIA

- Graduate and above
- Any educational background

All applicants to note the following:

- Admission to the program is not subject to early submission of application form.
- Corporate nominations will be restricted to not more than five nominees so as to ensure a fair distribution of the cohort.
- FLAME reserves the right for selecting participants to this program.



WHO SHOULD NOT ATTEND?

Someone who is expecting detailed discussion on process engineering, manufacturing techniques and factory tooling will not find too much value.

We will be providing a global overview of this sector from a business point of view and we lack the experience to provide a practitioner's point of view.



WHAT NOT TO EXPECT?

No stock tips will be given. The program is about developing the right-thinking style to become more rational. While this has many useful applications and investing wisely is one of them, if you are contemplating attending this workshop to find ways to get rich quickly, then please do not apply as you will be disappointed.



PROGRAM FEES

- INR 27,500 plus GST (INR 32,450) which includes tuition, course materials, meals and on campus accommodation.
- Fee does not include travel and other incidental expenses.
- Candidates need to submit the application form online.
- On being selected for the program, candidates will receive an online payment link. Selected candidates must complete the payment within 4 days of receiving their selection notification, which is latest by May 15, 2025.
- Kindly note, even if the application is submitted, but the payment is not made within the communicated deadline, the application will be deemed incomplete and annulled.



APPLICATION DEADLINE

May 05, 2025



SELECTION NOTIFICATION

Confirmation emails will be sent to the selected participants by May 12, 2025.

APPLICATION PROCEDURE

To apply the applicant must complete the application form.

APPLY NOW



WITHDRAWAL AND CANCELLATION POLICY

1. In the event that FLAME University is unable to provide the program, all fees will be fully refundable.
2. For selected candidates:
 - If a request for withdrawal is received **before and up to June 14, 2025**, the full amount of the fee paid shall be refunded.
 - If a request for cancellation is received **after June 14, 2025**, 10% of the fee paid shall be refunded. GST on cancellation will be applicable.
 - In case of withdrawal, the fee paid **shall not** be carried forward to future programs.



TESTIMONIALS

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ARPIT RANKA
Independent
Investor



**FLAME
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DNYANESH BHATAVADEKAR
Independent
Investor



FACILITIES AND INFRASTRUCTURE

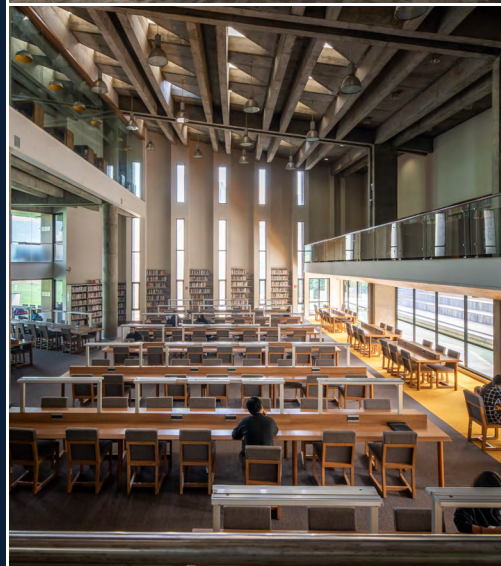
FLAME offers 70 acres of tranquil space, just 13 kms. from the Pune University main gate. It is an eco-friendly campus adjoining an 18-hole golf course. FLAME has an international sized cricket ground, football, tennis, basketball and volleyball courts, outdoor Olympic sized swimming pool, track and field, futsal and handball at their disposal. A fitness and conditioning studio, badminton courts, billiards tables, squash courts, table tennis, carrom and chess ensure that FLAME's sports facilities are second to none.

Its academic spaces include an auditorium, lecture theatres, conference rooms, a library, a performing arts studio, a visual arts studio, a sculpture studio, Physics, Chemistry and Biology labs, Financial Research lab and amphitheatres. Some of the other amenities include cafes, Wi-fi connectivity, an infirmary and an ambulance in case of emergency.

During the duration of the program, participants are encouraged to explore the campus and use the facilities FLAME offers.

ACCOMMODATION

Accommodation will be provided in an AC, double occupancy room to all participants at the FLAME campus in Pune for the night of July 05, 2025.





CONTACT

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VENUE

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RESOURCES

SPEAKERS' REPOSITORY

Over the years, FLAME Investment Lab (FIL) has been able to attract the most revered and noted investment minds of the country. Their candid sessions elaborating their investment experience has gone a long way in shaping the investment thought processes of the participants. Our website features a collection of presentations, articles, videos, and valuable insights from the speakers at FIL.



SPEAKERS' REPOSITORY

FIL WITH THE MASTERS

FLAME Investment Lab With The Masters is a residential program, structured keeping in mind our conviction that value investing is the only proven successful investment process that has delivered above market returns through various market cycles. It provides investors with various tools needed to form a temperamentally sound investment discipline. Additionally, it gives participants an opportunity to interact and learn from investment masters and understand their investment process.



FIL WITH MASTERS

FIL OTHER PROGRAMS

Explore the range of programs offered by FLAME Investment Lab. Scan the QR code to discover more details of all our programs.



FIL OTHER PROGRAMS

FIL SUMMER PROGRAMS 2025

01

JUNE 21 - JUNE 22, 2025

BEYOND BORDERS - INSIGHTS FROM GLOBAL EMERGING MARKETS

by Amay Hattangadi

06

AUGUST 01 - AUGUST 03, 2025

ALUMNI REUNION

02

JUNE 25 - JUNE 29, 2025

FIL WITH THE MASTERS

07

AUGUST 09 - AUGUST 10, 2025

CRAFT OF INVESTING

by Navneet Munot

03

JULY 05 - JULY 06, 2025

EMERGING SECTORS AND INVESTING IMPLICATIONS

by Rajeev Thakkar & Raunak Onkar

04

JULY 10 - JULY 13, 2025

EQUITY ANALYSIS FOR BEGINNERS

by Jatin Khemani

05

DATES TO BE ANNOUNCED

CASES IN BUSINESS AND INVESTMENT ANALYSIS

by Sanjay Bakshi



DISCLAIMER

The programs offered by the FLAME Investment Lab (FIL) are intended solely for educational purposes. The content delivered through various formats—including lectures, discussions, presentations, and marketing materials—is designed to enhance participants' understanding of fundamental value investing principles.

FIL does not provide, either directly or indirectly, investment advice, recommendations, or endorsements related to specific securities, financial products, or investment strategies. Any references to the past

or potential future performance of securities are meant for illustrative purposes only and should not be interpreted as guarantees or predictions.

Participants in FIL programs are strongly encouraged to seek independent professional advice before making any financial decisions. FLAME University, its representatives, and speakers expressly disclaim any liability for financial decisions made based on the educational content provided.



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