



**University of
Zurich** UZH

UZH International Summer Schools 2020 (Online Format)

**Finance for the Future: Investments, Sustainable
Finance and FinTech**

**Department of Banking and
Finance, University of Zurich**

5 – 24 July 2020





Preface

Stability, universality, responsibility and excellence – these are the four cornerstones of Swiss banking. These values are the foundation of the success of the Swiss financial center. Today, Switzerland is the leader in cross-border asset management - 27.5% of cross-border assets managed around the world are managed in Switzerland.

However, it is important to keep up with the **most recent trends and developments** that are promising for the future. The Swiss banks will on the one hand continue to orientate themselves along the four cornerstones. On the other hand it will be essential to take **recent developments as FinTech and Sustainability** in account in order to stay a competitive in the long run. Of course, we will also discuss **the impact of the current global health situation** on the financial markets.

Participating in this online summer school will not only allow you to learn theoretical aspects about finance, but also to interact with practitioners and experts from academia. A unique opportunity to **expand your network!**



Main Learnings



Get to know the past, present and future development of the Swiss financial system and the wealth management in Switzerland.



Enhance your knowledge in macroeconomics and finance (financial instruments, asset classes, behavioral finance).



Learn from scientists and people from the practice about the most recent and promising trends in FinTech and Sustainable Finance.



Test and apply your gained knowledge in a portfolio management game.

Program





Content





Content: Swiss Financial System

The Swiss market is the largest off-shore wealth manager worldwide and the headquarter of two of the largest banks (UBS and Credit Suisse). In the past, the Swiss financial system profited from different factors as Switzerland as a safe haven, its historical neutrality, the strong and stable Swiss franc etc. For the future, there are different challenges in sight.

Learn more about one of the most important financial centers worldwide from a national and international perspective.



- History of Switzerland, a portrait of a small country
- History of the Swiss financial sector and system
- Wealth management in Switzerland and its challenges





Content: Fundamentals of Finance

In order to provide a sound background for the topics Portfolio Management, Sustainable Finance and FinTech, this section covers different theoretical topics in the field of finance.



- Macroeconomics
- Financial Instruments
- Asset Classes
- Behavioral Finance





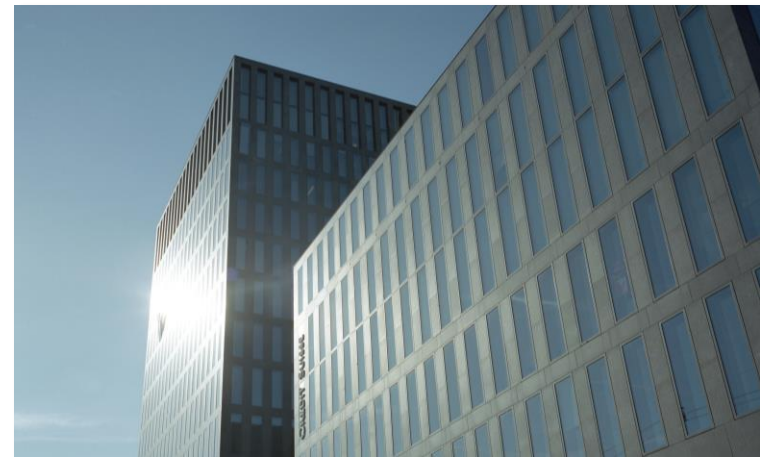
Content: FinTech

Finance + Innovation = FinTech

«Some countries may have oil, gas or coal. Switzerland's most valuable natural resource is innovation.» Swiss Finance Startups, 2019

FinTech has become an important supporting pillar for the Swiss financial sector. Get to know different FinTech trends and its disruptive potential within the financial sector.

- Introduction to FinTech
- FinTech in Wealth Management
- Introduction to Crypto Currencies (e.g. Blockchain)
- Introduction to InsureTech
- Introduction to PropTech





Content: Sustainable Finance

«Sustainable finance refers to any form of financial service integrating environmental, social and governance (ESG) criteria into the business or investment decision for the lasting benefit of both clients and society at large.», Swiss Sustainable Finance, 2019

Develop an understanding for the sustainable development in the financial sector as well as its value generation in economic, environmental and social terms.

- Introduction
- Sustainable Investing & Emerging Market Finance
- Sustainability in the Finance Sector (Banking, Insurance)
- Microfinance





Lecturers and Guest Speakers

Professors and Lecturers from
the University of Zurich



Guest Speakers from the
Practice





Teaching and Learning Methods

- **Podcasts and Livestreams:** Watch sessions on our online platform* and interact with lecturers during live sessions or watch them again if they have been recorded**
- **Q&A sessions:** Ask your questions and get answers from your teaching team at the UZH Department of Banking and Finance
- **Group work:** Interact with other students, work together on your projects and improve your presentation skills
- **Wrap-up sessions:** Get an interactive recap of the program at the end of each week

*All course content will be provided via one platform. Enrolled students will get an invitation to join the platform before the summer school starts.

**Due to privacy/data protection reasons, not every session will be recorded.



Assessment

In order to get 6 ECTS for this online summer school, you have to:

- Watch all podcasts / livestreams in accordance with the schedule
- Participate actively in the interactive sessions
- Work in groups, give (group) presentations and hand in your project(s) in time

→ You will receive your Transcript of Records (stating your grade with „pass“ or „fail“) and a Certificate of Attendance by the end of July 2020.



Tentative Schedule Week 1 (5 – 10 July 2020)

	Half day	Half day
Sun, 5 July		Welcome to the UZH International Online Summer Schools / Social Program open to all summer programs (International Relations Office)
Mon, 6 July	Welcome and Introduction to the Course (International Relations Office / Department of Banking and Finance)	The Swiss Financial Center Group Work: Switzerland
Tue, 7 July	Short Presentation Group Work Financial Instruments	Asset Classes
Wed, 8 July	Q&A Financial Instruments & Asset Classes and Task Presentation 1 Group Work: Students Presentation 1	Group Work: Students Presentation 1
Thu, 9 July	Introduction to FinTech	Group Work: Students Presentation 1
Fri, 10 July	Students Presentation 1 and Wrap-up	PropTech

Interactive sessions will be offered in the mornings and afternoons respectively (CEST resp. GMT+2) in order to accommodate different time zones. We will create a detailed schedule with exact times as soon as we know where students are coming from and which time zones we need to take into account. Students will join groups that allow working together despite time shifts.



Tentative Schedule Week 2 (12 – 17 July 2020)

	Half day	Half day
Sun, 12 July		Social Program for all summer programs (optional)
Mon, 13 July	Introduction to Sustainable Finance Marketing, Impact and Sustainability: View from a bank	Emerging Market Finance
Tue, 14 July	Q&A Sustainable Finance Introduction Portfolio Management Game	Sustainable Investing Wealth Management in Switzerland
Wed, 15 July	Portfolio Management Game: Round 1 Current Challenges at the Swiss Financial Center	Portfolio Management Game: Results Round 1 Portfolio Management Game: Round 2
Thu, 16 July	Portfolio Management Game: Results Round 2 and Q&A Microfinance and Task Students Presentations 2	Group Work: Students Presentation 2
Fri, 17 July	Crypto Currencies Behavioral Finance	Financial Sustainability

Interactive sessions will be offered in the mornings and afternoons respectively (CEST resp. GMT+2) in order to accommodate different time zones. We will create a detailed schedule with exact times as soon as we know where students are coming from and which time zones we need to take into account. Students will join groups that allow working together despite time shifts.



Tentative Schedule Week 3 (19 – 24 July 2020)

	Half day	Half day
Sun, 19 July		Social Program for all summer programs (optional)
Mon, 20 July	Q&A Task Sustainable Finance Group Work: Students Presentation 2	Group Work: Students Presentation 2
Tue, 21 July	Students Presentation 2 and Wrap-up	Portfolio Management Game: Round 3
Wed, 22 July	Portfolio Management Game: Results Round 3 Shareholder Activism Game	Portfolio Management Game: Round 4
Thu, 23 July	Portfolio Management Game: Results Round 4 Climate Change and Sustainable Finance	Portfolio Management Game: Round 5
Fri, 24 July	Portfolio Management Game: Results Round 5 FinTech and Start-ups	Wrap-up Session & Graduation Ceremony for all summer programs

Interactive sessions will be offered in the mornings and afternoons respectively (CEST resp. GMT+2) in order to accommodate different time zones. We will create a detailed schedule with exact times as soon as we know where students are coming from and which time zones we need to take into account. Students will join groups that allow working together despite time shifts.



Team



Your Team from the Department of Banking & Finance



Beni



Anja



Isabelle



Lorenz