



TRAINING SPRINTS

HUMAN INTELLIGENCE

STORYTELLING IN INVESTMENT MANAGEMENT

LECTURER	Matthias Strolz
LENGTH	3h
LEARNING GOAL	Understand how to form a narrative based on evidence that supports your investment hypothesis.
PS FRAMEWORK	Behaviour / Individual
CPD ACCREDITED	Yes (3 credits)
LANGUAGE	English (on-demand in German)
BENEFICIAL FOR	All investment professionals
SPRINT STRUCTURE	90min input + 90min deliberate practice, reflection and implementation planning
FORMAT	Online (Zoom)
COSTS	EUR 298 per participant
MINIMUM SIZE	5 participants

June 6th, 2023 /3 p.m. - 6 p.m./

DESCRIPTION

STORIES EAT NUMBERS FOR BREAKFAST.

This ageing knowledge acts as a double-edged sword for professional investors.

How can we get empowered through that? Connecting pieces of evidence to an investment hypothesis creates a narrative. How to bring the evident substance into a narrating form? Can you create a genuine story that can be plausibly conveyed to colleagues, investors and regulators? Why should we even work on telling an investment story? How to distinguish between leading versus misleading storytelling? Join this sprint for a refreshingly new perspective on advancing the quality of your investment hypothesis.

PROGRAM

PART ONE

BEST PRACTICES (90min)

- What is a/your story?
- How does your story connect with your mission and purpose?
- Principles and success factors of storytelling
- Methodology of framing & story implementation

BREAK (10min)

PART TWO

DELIBERATE PRACTICE (60min)

Apply best practices on how to convert evidence into a narrating investment hypothesis.

LESSONS LEARNED (15min)

NEXT STEPS (5min)

