PANTHERA SOLUTIONS

TRAINING SPRINTS 2023

BEHAVIOURAL DESIGN FOR BETTER INVESTMENT DECISIONS

TRAINING SPRINTS | CATALOGUE 2023

#	TRAINING SPRINT	CATEGORY	PS FRAMEWORK	PS SERVICE	PS SPECIALIST
1	BEHAVIORALLY OPTIMIZED STRATEGIC ASSET ALLOCATION	HUMAN INTELLIGENCE	BEHAVIOR / GROUP	PANTHERA TREE	Dr. MARKUS SCHULLER
2	STRATEGIC NETWORKING PRINCIPLES FOR INVESTORS	HUMAN INTELLIGENCE	BEHAVIOR / INDIVIDUAL	PANTHERA ACADEMY	LUCA SIGNORETTI
3	STORYTELLING PRINCIPLES IN INVESTMENT MANAGEMENT	HUMAN INTELLIGENCE	BEHAVIOR / INDIVIDUAL	PANTHERA ACADEMY	Dr. MATTHIAS STROLZ
4	ADVANCED PORTFOLIO CONSTRUCTION PRINCIPLES	ARTIFICIAL INTELLIGENCE	CHOICE ARCHITECTURE / TOOLBOX	PANTHERA TREE	Dr. THORSTEN NEUMANN
5	CAUSAL INFERENCES IN CAPITAL MARKETS	ARTIFICIAL INTELLIGENCE	CHOICE ARCHITECTURE / TOOLBOX	PANTHERA TREE	Dr. MARKUS SCHULLER
6	NET ZERO ROADMAP – INVESTMENT DESIGN PRINCIPLES	SUSTAINABLE INVESTING	CA / PROCESS / METHODS	PANTHERA TREE	Dr. MARKUS SCHULLER
7	DESIGN PRINCIPLES FOR INVESTMENT COMMITTEES	HUMAN INTELLIGENCE	BEHAVIOR / GROUP	PANTHER ACADEMY	Dr. MARKUS SCHULLER
8	STRATEGIC BUSINESS DEVELOPMENT PRINCIPLES IN FINANCE	HUMAN INTELLIGENCE	BEHAVIOR / GROUP	PANTHER ACADEMY	LUCA SIGNORETTI
9	QUANTITATIVE ALPHA GENERATION	ARTIFICIAL INTELLIGENCE	CHOICE ARCHITECTURE / TOOLBOX	PANTHERA TREE	Dr. THORSTEN NEUMANN
10	NOWCASTING PRINCIPLES IN INVESTMENT MANAGEMENT	ARTIFICIAL INTELLIGENCE	CHOICE ARCHITECTURE / TOOLBOX	PANTHERA TREE	Dr. MARKUS SCHULLER

LECTURERS

ABOUT THE LECTURER

Mag. Dr. Markus Schuller, MBA, MScFE

STRATEGIC ASSET ALLOCATION & BEHAVIORAL DESIGN SPECIALIST

Markus Schuller is the founder and managing partner of Panthera Solutions. As Investment Decision Architects ™, Panthera optimizes the choice architecture of professional investors through applied behavioral finance methods.

As adjunct professor, Markus teaches courses at renowned Master in Finance programs of the EDHEC Business School, the IE Business School and the International University of Monaco. Markus publishes in academic top journals (i.e. Journal of Portfolio Management), writes articles for professional journals (i.e. CFA Institute, OECD Insights, etc.) and holds keynotes at international investment conferences.

In short, as investment banker, adjunct professor and author, Markus looks back at more than 20 rewarding years of trading, structuring, and managing standard and alternative investment products. Prior to founding Panthera Solutions, he worked in executive roles for a long/short equity hedge fund for which he developed the trading algorithm. Markus started his career working as equity trader, derivatives trader and macro analyst for different banks.

ABOUT THE LECTURER

Mag. Dr. Matthias Strolz

ORGANIZATIONAL AND BEHAVIORAL DESIGN SPECIALIST

Matthias Strolz has become known as a successful organizational developer in the for-profit, non-profit and political domains. His work on systemic organizational development is complemented by a deep intrinsic motivation for nurturing talents.

His best-selling books on personal development are representing an expression of his motivation. He is also equity partner with the story- & publishing-platform story.one and the product agency something.creative vie.

ABOUT THE LECTURER

Prof. Dr. **Thorsten Neumann**

QUANTITATIVE ASSET & RISK MANAGEMENT SPECIALIST

Tenured Professor at Neu-Ulm University of Applied Sciences since 2019. Keynote speaker, panellist at conference & seminars.

18+ years in leading managing roles at Deka Investment and Union Investment i.e. as Head of Quant & Risk Management.

ABOUT THE LECTURER

Luca Signoretti, MBA

EXECUTIVE LEADERSHIP TRAINER & COACH
UNIVERSITY PROFESSOR IN LEADERSHIP & MARKETING

Luca is a former international corporate leader with a 25+ year experience with large companies such as Unilever, Danone, Ferrero and Heineken.

Over the last decade, he has built on his corporate experience and has become' a corporate advisor and executive coach to individual leaders and Leadership Teams and an expert in 'Agile Leadership'. Luca works with Global Fortune 500 organizations as Deloitte, Carrefour, Volkswagen and Barclays, among others.

Luca is also a leadership university professor at EDHEC (France) and IUM (Monaco) and he speaks at top-ranked business schools around the world like HEC Paris, London School of Economics, London Business School and NYU-Stern.

Luca's mission is to help leaders stay competitive in a world that changes too fast, by becoming more agile and effective. He is a Partner at Panthera Solutions, focusing on leadership-related topics.

ABOUT THE LECTURER

Jonas Englund, MBA,

GREEN FINANCE SPECIALIST

25+ years of experience across Investment Banking, Trading & Capital Markets and Treasury. Advisory board member (NSBN), keynote speaker for different banks.

Sustainability Finance expert with over 25 years of experience across Investment Banking, Trading & Capital Markets and Treasury. Spearheaded the introduction of Green Bonds to North American institutional capital markets in 2011 when establishing SEB's US Fixed Income Operations.

Frequent speaker and panel member on Sustainability and Green Bonds. Advisory Board member at Nasdaq Sustainable Bond Network (NSBN), Member of Columbia University Sustainable Finance Seminar, Guest Lecturer at Columbia University SIPA and University of Michigan on Green Bonds and other Sustainable Funding structures. Board Member of High Ground, Inc., a corporation focusing on innovative agricultural sustainability solutions. He is a Partner at Panthera Solutions, focusing on Sustainable Investing.

ABOUT THE LECTURER

Grant Metcalfe-Smith MSc, MA

GREEN FINANCE SPECIALIST

Development and Sustainable (ESG/Climate) Finance specialist. Grant has 25+ years' experience of emerging market debt + equity investment advisory, structuring and leadership in the EBRD and London-based investment banks.

He actively consults for development finance institutions and teaches
Sustainable Finance using his knowledge + experience as an investor in green, social, sustainable +sustainability-linked bonds and loans. His consulting, teaching and business coaching is informed by academic studies, experience of and interest in behavioural change and experiential learning. He is a Partner of Panthera Solutions focusing on Sustainable Investing.

TRAINING SPRINTS
CATALOGUE 2023

TRAINING SPRINTS
CATALOGUE 2023

FEATURES	
1.5 OR 3 HOURS	
1 PANTHERA SPECIALIST	
ONLINE	
IN ENGLISH	
PANTHERA ACADEMY PLATFORM-HOSTED	
ONLINE REGISTRATION	
CPD ACCREDITED	
EUR 149 (1.5h) | EUR 298 (3h)	
PAYMENT BY PAYPAL, CC OR BANK TRANSFER	
MINIMUM PARTICIPANTS	5

SPRINT STRUCTURE	
STANDARDIZED PANTHERA OPENING	
TOPIC INPUT	50%
BREAK	10 MIN
DELIBERATE PRACTICE	30%
LESSONS LEARNED	10%
NEXT STEPS	5%
FEEDBACK FORM	5%

WHAT DOES A PANTHERA TRAINING SPRINT PROVIDE?

AN ACTIVE LEARNING ENVIRONMENT INVOLVING DELIBERATE PRACTICE, IN AN OPTIMAL ONLINE SETTING.

TRAINING SPRINTS

HUMAN INTELLIGENCE

BEHAVIORALLY OPTIMIZED STRATEGIC ASSET ALLOCATION

LECTURER	Markus Schuller
LENGTH	3h
LEARNING GOAL	Learn how to strategically allocate assets by applying behavioural design principles.
PS FRAMEWORK	Behaviour / Group
CPD ACCREDITED	Yes (3 credits)
LANGUAGE	English (on-demand in German)
BENEFICIAL FOR	Investment committee members, CIOs, Board of directors, Investors with fiduciary duty,
SPRINT STRUCTURE	90min input + 90min deliberate practice, reflection and implementation planning
FORMAT	Online (Zoom)
COSTS	EUR 298 per participant
MINIMUM SIZE	5 participants

May 4th, 2023 /3 p.m. - 6 p.m./

DESCRIPTION

We know from other industries, the ability to learn faster than your competitors in your specialization, may be the only sustainable competitive advantage. Participants will learn how to rationally allocate assets in professional investment management by applying
behavioural design principles.

Adaptive markets require adaptive strategic asset allocation methods to take most evidence-based investment decisions. Study the characteristics of adaptive asset management techniques and how to practically apply them to strengthen your edge.

PROGRAM

PART ONE

BEST PRACTICES (90min)

- Introduction to Adaptive Markets
- Third Generation Asset Allocation (3GEN)
- 3GEN Definition of Risk, Return & Diversification
- Full vs Bounded Rationality
- 3 Alpha Sources > Market, Impact & Behaviour
- Global Capital Stock vs Multi Asset Portfolios

BREAK (10min)

PART TWO

DELIBERATE PRACTICE (60min)

Participants will reflect on their own strategic asset allocation techniques and how to improve them by applying previously introduced behavioural design methods.

LESSONS LEARNED (10min)
NEXT STEPS (5min)
FEEDBACK FORM (5min)

TRAINING SPRINTS

HUMAN INTELLIGENCE

STRATEGIC NETWORKING PRINCIPLES FOR INVESTORS

LECTURER	Luca Signoretti
LENGTH	1.5h
LEARNING GOAL	Learn how to improve your decision quality as an investment professional by building your most effective professional networks
PS FRAMEWORK	Behaviour / Group
CPD ACCREDITED	Yes (1.5 credits)
LANGUAGE	English (on-demand in French and Italian)
BENEFICIAL FOR	All investment professionals
SPRINT STRUCTURE	45min input + 45min deliberate practice, reflection and implementation planning
FORMAT	Online (Zoom)
COSTS	EUR 149 per participant
MINIMUM SIZE	6 participants (even number for role-plays preferred)

May 11th, 2023 /3 p.m. – 4,30 p.m./

DESCRIPTION

Increasingly complex and uncertain market environments require robust professional networks to enrich and improve your decision-making and put you ahead of your peers.

Learn how to put the power of networks on your side by being introduced to best practices on sourcing the critical support from the people who can help you the most.

PROGRAM

PART ONE

BEST PRACTICES (45min)

- The best strategic approach to build your most helpful networks
- The psychological laws of how to connect with others
- The most effective process of relationship building
- How to keep your network relationships alive over time

PART TWO

DELIBERATE PRACTICE (25min)

Participants will apply the best practices in 1-to-1 role-playing exercises to get more comfortable with their implementation.

LESSONS LEARNED (10min)
NEXT STEPS (5min)
FEEDBACK FORM (5min)

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)

TRAINING SPRINTS

ARTIFICIAL INTELLIGENCE

ADVANCED PORTFOLIO CONSTRUCTION

LECTURER	Thorsten Neumann
LENGTH	3h
LEARNING GOAL	Learn how to get your portfolio construction to best practice levels
PS FRAMEWORK	Choice Architecture / Toolbox
CPD ACCREDITED	Yes (3 credits)
LANGUAGE	English (on-demand in German)
BENEFICIAL FOR	Fund managers and investment professionals
SPRINT STRUCTURE	Dedicated best practice input combined with deliberate reflection and implementation planning
FORMAT	Online (Zoom)
COSTS	EUR 298 per participant
MINIMUM SIZE	5 participants

June 15th, 2023 /3 p.m. – 6 p.m./

DESCRIPTION

Success in portfolio management is all but random.
This holds in particular true for portfolio construction. Investors need to take the right risks.
Beyond the free lunch of diversification, advanced techniques to optimize risk allocation need to be applied. The course deploys how you get your portfolio construction policies to best practice levels. This includes strategic diversification, alpha diversification, risk budgeting, stop loss and risk management principles.

Participants learn how to implement their specific risk taking strategy.

PROGRAM

PART ONE

BEST PRACTICES (90min)
Input and reflection on
- Embedding portfolio construction in your investment process
- Alpha diversification
- Investment process design
- Risk budgeting

BREAK (10min)

PART TWO

DELIBERATE PRACTICE (60min)
Input and reflection on
- Optimized risk budgeting
- Individual risk taking strategy
- Portfolio applications

LESSONS LEARNED (10min)
NEXT STEPS (5min)
FEEDBACK FORM (5min)

TRAINING SPRINTS

ARTIFICIAL INTELLIGENCE

CAUSAL INFERENCES IN CAPITAL MARKETS

LECTURER	Markus Schuller
LENGTH	1.5h
LEARNING GOAL	Learn how to use causality assessment tools to increase the SDG impact of your investments.
PS FRAMEWORK	Behaviour / Individual
CPD ACCREDITED	Yes (1.5 credits)
LANGUAGE	English (on-demand in German)
BENEFICIAL FOR	Investment committee members, CIOs, Board of directors, Investors with fiduciary duty,
SPRINT STRUCTURE	90min input + 90min deliberate practice, reflection and implementation planning
FORMAT	Online (Zoom)
COSTS	EUR 149 per participant
MINIMUM SIZE	5 participants

June 29th, 2023 /3 p.m. – 4,30 p.m./

DESCRIPTION

In 2023, sustainable investing is a hotter than ever topic and it's clear that finance professionals can no longer allow themselves to ignore SDG issues in their investment analysis and decisions. Simply put, being SDG-compliant offers an opportunity for investment decision makers to strengthen their comparative advantage through innovative specialization. In order to exploit this opportunity, investors will need to step-up in utilizing the advantages of new assessment techniques.

This training sprint introduces the advantages of causality analysis to measure and maximize your impact on Sustainable Development Goals (SDG).

PROGRAM

PART ONE

BEST PRACTICES (40min)

- Introduction to causality assessment
- Causality assessment in the context of Sustainable Development Goals (SDG)
- Categorization of causality assessment tools
- Best practices when using causality assessment tools

BREAK (5min)

PART TWO

DELIBERATE PRACTICE (30min)

Participants will apply one of the causality assessment tools to their own portfolio to simulate the impact of an investment decision.

LESSONS LEARNED (5min)
NEXT STEPS (5min)
FEEDBACK FORM (5min)

TRAINING SPRINTS

SUSTAINABLE INVESTING

NET ZERO ROADMAP
INVESTMENT DESIGN PRINCIPLES

LECTURER	Markus Schuller
LENGTH	1.5h
LEARNING GOAL	Participants will learn about investment design principles to optimize their net zero roadmap
PS FRAMEWORK	Behaviour / Individual
CPD ACCREDITED	Yes (1.5 credits)
LANGUAGE	English
BENEFICIAL FOR	CIOs, Asset Allocators, Analysts, PMs, Strategists, Board of directors, Sustainability & Stewardship Officers etc.
SPRINT STRUCTURE	90min input + 90min deliberate practice, reflection and implementation planning
FORMAT	Online (Zoom)
COSTS	EUR 149 per participant
MINIMUM SIZE	5 participants

September 14th, 2023 /3 p.m. – 4,30 p.m./

DESCRIPTION

The energy transition to a low-carbon economy will require the development of a wide range of new financial instruments and innovations, with profound implications for markets, companies, intermediaries and investors.

A pre-requisite: the seamless integration of profit and impact motive into the investment process. The question remains, how to do that. Participants will learn about investment design principles to achieve this seamless integration onto their own net zero roadmap.

PROGRAM

PART ONE

BEST PRACTICES (45min)

- Introduction to Net Zero Portfolio Management (NZPM)
  - SDG Selection
  - Value Creation Focus
  - Causal Impact Assessment
  - Investment Process Adaptability
  - Investment Professional Adaptability
- NZPM Investment Design Principles

PART TWO

DELIBERATE PRACTICE (30min)

Participants will practice how to work in the design principles into their own area of responsibility.

LESSONS LEARNED (5min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

TRAINING SPRINTS

HUMAN INTELLIGENCE

DESIGN PRINCIPLES FOR INVESTMENT COMMITTEES

LECTURER	Markus Schuller
LENGTH	1.5h
LEARNING GOAL	Learn how to configure a committee that produces the most evidence-based investment decisions.
PS FRAMEWORK	Behaviour / Group
CPD ACCREDITED	Yes (1.5 credits)
LANGUAGE	English (on-demand in German)
BENEFICIAL FOR	Investment committee members, CIOs, Board of directors, Investors with fiduciary duty,
SPRINT STRUCTURE	90min input + 90min deliberate practice, reflection and implementation planning
FORMAT	Online (Zoom)
COSTS	EUR 149 per participant
MINIMUM SIZE	5 participants

September 28th, 2023 /3 p.m. – 4,30 p.m./

DESCRIPTION

Investment committees are well established decision making bodies. They are expected to enrich the competencies of their participants in order to take the most informed investment decisions. Instead, they often get exposed to group biases, conflicts and formalities, leading to suboptimal investment decisions.

Learn how to configure an investment committee to achieve most evidence-based decisions. Explore best practices that help your team to focus. Enable them to master challenges, setbacks and even crises better than others. A crucial comparative advantage.

PROGRAM

PART ONE

BEST PRACTICES (40min)

- Maximizing Cognitive Diversity for high performance investment teams
- Train decisions under uncertainty
- Increase ambiguity tolerance
- Heuristics for creative and critical thinking
- Introduce simple rules
- Align incentive systems

BREAK (5min)

PART TWO

DELIBERATE PRACTICE (30min)

Participants will reflect on their own investment teams/committees and explore how to optimize it by applying previously introduced techniques.

LESSONS LEARNED (5min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

TRAINING SPRINTS

HUMAN INTELLIGENCE

STRATEGIC BUSINESS DEVELOPMENT PRINCIPLES IN FINANCE

LECTURER	Luca Signoretti
LENGTH	1.5h
LEARNING GOAL	Learn the reasons why clients decide to work with you or not and leverage them to attract new clients.
PS FRAMEWORK	Behaviour / Group
CPD ACCREDITED	Yes (1.5 credits)
LANGUAGE	English (on-demand in French and Italian)
BENEFICIAL FOR	All investment professionals with commercial duties
SPRINT STRUCTURE	45min input + 45min deliberate practice, reflection and implementation planning
FORMAT	Online (Zoom)
COSTS	EUR 149 per participant
MINIMUM SIZE	5 participants

October 12th, 2023 /3 p.m. – 4,30 p.m./

DESCRIPTION

Ultimately your success in the business is defined by your clients. Whatever expertise you might deliver, cannot compensate for the lack of paying clients in assuring the sustainability of your business. A clients' choice to work (or continue to work) with you or not is significantly influenced by clear behavioral rules. Knowing how to leverage them gives you a critical competitive edge in growing your business.

You will learn how to fully understand your client's mindset, behaviors and expectations to better satisfy their needs and generate more business.

PROGRAM

PART ONE

BEST PRACTICES (45min)

- Understanding the decision-making process any client goes through
- How to connect with new clients
- Selecting the right client approach
- The key psychological levers to convince new clients to join you
- How to maintain great relationships with existing clients

PART TWO

DELIBERATE PRACTICE (25min)

Participants will apply the learning principles within their own professional context, developing their implementable solutions to grow their client base.

LESSONS LEARNED (10min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

TRAINING SPRINTS
ARTIFICIAL INTELLIGENCE

QUANTITATIVE ALPHA GENERATION

LECTURER	Thorsten Neumann
LENGTH	3h
LEARNING GOAL	Learn how to analyse financial markets by means of econometrics to generate alpha for managing portfolios
PS FRAMEWORK	Choice Architecture / Toolbox
CPD ACCREDITED	Yes (3 credits)
LANGUAGE	English (on-demand in German)
BENEFICIAL FOR	Fund managers and investment professionals
SPRINT STRUCTURE	Dedicated best practice input combined with deliberate reflection and implementation planning
FORMAT	Online (Zoom)
COSTS	EUR 298 per participant
MINIMUM SIZE	5 participants

October 19th, 2023 /3 p.m. – 6 p.m./

DESCRIPTION

Alpha is the essential precondition for successful portfolio management. Fund managers need to rely on successful techniques for alpha generation. The course deploys how to get your econometric analyses to best practice levels. This includes fair value analysis, scenario analysis and forecasting. It provides clear guidance to successful pure quant investment processes as well as hybrid investment processes combining discretionary and quant elements.

Participants learn how to implement their specific alpha generation strategy.

PROGRAM

PART ONE

BEST PRACTICES (90min)
Expert input and reflection of participants on their own practices
- econometrics
- Fair value analysis
- Scenario analysis

BREAK (10min)

PART TWO

DELIBERATE PRACTICE (60min)
Expert input and reflection of participants on their own practices
- Forecasting
- Hybrid investment processes

LESSONS LEARNED (10min)
NEXT STEPS (5min)
FEEDBACK FORM (5min)

TRAINING SPRINTS

ARTIFICIAL INTELLIGENCE

NOWCASTING PRINCIPLES IN INVESTMENT MANAGEMENT

LECTURER	Markus Schuller
LENGTH	1.5h
LEARNING GOAL	Learn how to include latest nowcasting techniques in the investment decision design. Purpose: most rational investment decisions.
PS FRAMEWORK	Behaviour / Group
CPD ACCREDITED	Yes (1.5 credits)
LANGUAGE	English (on-demand in German)
BENEFICIAL FOR	Investment committee members, CIOs, Board of directors, Investors with fiduciary duty,
SPRINT STRUCTURE	90min input + 90min deliberate practice, reflection and implementation planning
FORMAT	Online (Zoom)
COSTS	EUR 149 per participant
MINIMUM SIZE	5 participants

November 9th, 2023 /3 p.m. – 4,30 p.m./

DESCRIPTION

Forecasting is dead. Long live Nowcasting.
This Training Sprint reviews in detail the latest developments and best practices on nowcasting techniques. The term forecasting implies estimating the future, so the term nowcasting is used when we want to estimate the present most evidence-based. When investment management turns into uncertainty management, nowcasting is imperative in understanding the market.

Nowcasting facilitates the most plausible integration of new evidence in one's understanding of capital markets. The challenge - especially in the context of net zero portfolio management - is about the evidence (data) either being unavailable or unstructured. We learn how to source, structure and compare data and benchmark the learnt against the management.

PROGRAM

PART ONE

BEST PRACTICES (40min)

- History and Limitations of Forecasting
- Introduction to Nowcasting
- Conditions of Nowcasting
- Uncertainty Management & Nowcasting
- Best Practices in Nowcasting
- Integrating Nowcasting in Investment Design

BREAK (5min)

PART TWO

DELIBERATE PRACTICE (30min)

Participants will reflect on how to work in nowcasting techniques in their own investment decision process.

LESSONS LEARNED (5min)
NEXT STEPS (5min)
FEEDBACK FORM (5min)

PIONEERS IN BRIDGING HUMAN & ARTIFICIAL INTELLIGENCE

Mag. Dr. MBA, MScFE

MARKUS SCHULLER

FOUNDER & MANAGING PARTNER
STRATEGIC ASSET ALLOCATION &
BEHAVIORAL DESIGN SPECIALIST

MBA, MScCRSG

BILJANA KLING

MANAGING PARTNER

VICTORIA BARKER

HEAD OF STRATEGIC
BUSINESS DEVELOPMENT

MA, MBA

PEIXIN DALLARA

SALES / USA & GLOBAL

Prof. Dr.

THORSTEN NEUMANN

QUANTITATIVE ASSET & RISK
MANAGEMENT SPECIALIST

MSc, MA

GRANT METCALFE-SMITH

GREEN FINANCE
SPECIALIST

Mag. Dr.

MATTHIAS STROLZ

ORGANISATIONAL & BEHAVIORAL
DESIGN SPECIALIST

MBA (LSE)

LUCA SIGNORETTI

LEADERSHIP & STAKEHOLDER
RELATIONSHIP SPECIALIST

JONAS ENGLUND

GREEN FINANCE
SPECIALIST

Prof. Dr.

HANS MÜHLBACHER

ACADEMY & ADVISORY BOARD

Prof. DDr.

SHABNAM MOUSAVI

ACADEMY & ADVISORY BOARD

Dr.

GREG DAVIES

ACADEMY & ADVISORY BOARD

PANTHERA ACADEMY
CERTIFICATES


PANTHERA SOLUTIONS

This is to certify that

CELINE SMITH

has successfully completed the

INTRODUCTION TO SOCIAL BOND INVESTING

An online certificate course developed
by the Panthera Solutions Sarl

CPD CERTIFIED
The CPD Certification Service

MARKUS SCHULLER
FOUNDER & MANAGING PARTNER

05.April 2023
24 HOURS

BILJANA KLING
MANAGING PARTNER

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INTESA SANPAOLO BANK

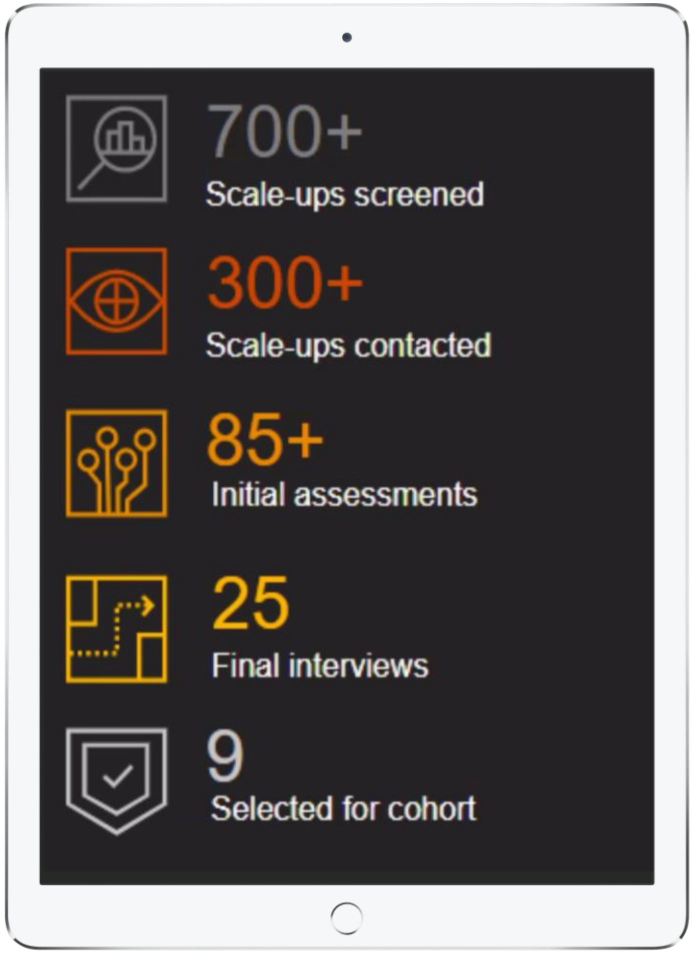
Swisscanto

United Nations Economic Commission for Africa

HUK HUK-COBURG

OBV

PANTHERA SOLUTIONS SELECTED FOR PRESTIGIOUS PWC SCALE PROGRAM 2022



Panthera Solutions was selected to join the prestigious **PwC Scale Programme** in 2022.

Out of 700+ screened FinTechs in Europe and North America, only 9 were accepted.
As PwC stated, Panthera Solutions was chosen as a ***" disruptive technology scale-up with a mindset-changing solution that can reshape the FinTech industry through accessible innovation."***

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CONTACT US.

MOST INNOVATIVE PROFESSIONAL FINANCE TRAINING
WORLD 2022

MOST INNOVATIVE TRAINING FOR INVESTMENT PROFESSIONALS
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EUROPE 2020

MOST INNOVATIVE BOUTIQUE ASSET ALLOCATION CONSULTANCY
EUROPE 2019