



University of
Zurich ^{UZH}

Department of Banking and Finance



UZH International Summer Schools 2023

Finance for the Future – Investments, Sustainable Finance and
FinTech (2 – 21 July 2023)

A wide-angle photograph of the Zurich cityscape, showing a dense urban area with various buildings, including a prominent church with a green dome in the foreground, and rolling hills in the background under a blue sky with scattered clouds.

On-campus
Summer School
Apply by
24 April 2023



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.

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 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 and international experience!**



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 etc.).



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.





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Program





Content

UZH International Summer School Finance for the Future



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 and Investments

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.

During the Portfolio Management Game, you and your team take on the role as a manager of a bank's portfolio management and compete with different teams. Based on a web-based simulation, the entire investment process is simulated from the perspective of an asset manager using historical or factiously generated business cycles. Who will win this challenge?

- Macroeconomics
- Financial Instruments
- Asset Classes



Content: 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. Develop an understanding for the drivers of change and transformation that are fundamental to business model innovation in the digital paradigm. To create sustainable value for the next generation, successful firms must seamlessly integrate financial and non-financial services into a digital ecosystem.

- Introduction to FinTech
- FinTech in Wealth Management
- Introduction to Crypto Currencies (e.g. Blockchain)
- Introduction to InsureTech and PropTech
- Digital transformation and digital ecosystem



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.

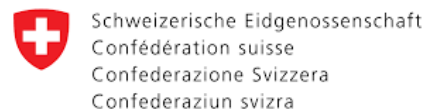
- Introduction to Sustainable Finance
- Sustainable Investing & Emerging Market Finance
- Sustainability in the Finance Sector (Banking, Insurance)
- Microfinance





Lecturers and Guest Speakers (indicative)

Profit from the expertise of multiple Professors and lecturers from the University of Zurich and other leading experts from academia and practice!



Julius Bär



Teaching and Learning Methods

- **Live-sessions:** Come to the lectures at the University of Zurich and interact with lecturers during live-sessions.
- **Podcast and online-sessions:** Selected sessions are held online and increase the flexibility during the summer school weeks.
- **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.
- **Game-based learning:** Apply the knowledge you gained within a digital simulation. Team spirit and fun will not be missing.



Assessment

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

- Prepare properly before the start of the program (approx. workload: 10 hours). Instructions and a reading list will be sent to you by the end of May 2023.
- Attend all live-sessions as well as watch the podcasts provided in accordance with the schedule
- Participate actively in the interactive sessions. Presence & participation during the whole summer school is required
- 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 Confirmation of Completion by the end of July 2023. Presence & participation during the whole summer school are required.





Tentative Schedule Week 1

	Half day	Half day
Sun, 2 July		Welcome & Introduction to UZH
Mon, 3 July	Welcome and Introduction by the University of Zurich and the Department of Banking and Finance	The Swiss Financial Center Swiss National Museum: Swissness, Tradition and Innovation
Tue, 4 July	Introduction to Finance (Traditional Finance & Risk-Return)	Interest Rates and Financial Markets Group Work Introduction: Assignment 1 (Asset Classes)
Wed, 5 July	Introduction to FinTech	Group Work: Assignment 1 (Asset Classes)
Thu, 6 July	Introduction to Sustainable Finance	Group Work: Assignment 1 (Asset Classes) Social Program
Fri, 7 July	Emerging Market Finance	Short Presentation and Wrap-up: Assignment 1 (Asset Classes)



Tentative Schedule Week 2

	Half day	Half day
Sa, 8 July	Day Off	
Sun, 9 July	Day Trip Social Program	
Mon, 10 July	Environmental and Financial Sustainability	Portfolio Management Game: Round 1
Tue, 11 July	Group Work Introduction: Assignment 2 (Sustainable Finance) Group Work: Assignment 2 (Sustainable Finance)	Portfolio Management Game: Round 2
Wed, 12 July	Microfinance	Use of Artificial Intelligence in Portfolio Management Portfolio Management Game: Round 3 Group Work Introduction: Assignment 3 (Portfolio Management)
Thu, 13 July	PropTech InsurTech	Wealth Management in Switzerland Portfolio Management Game: Round 4 Social Program
Fri, 14 July	Group Work: Assignment 3 (Portfolio Management)	Short Presentation and Wrap-up: Assignment 3 (Portfolio Management)



Tentative Schedule Week 3

	Half day	Half day
Sa, 15 July	Day Off	
Sun, 16 July	Day Trip Social Program	
Mon, 17 July	Digital Assets Cryptocurrencies & Tokenization	Group Work: Assignment 2 (Sustainable Finance)
Tue, 18 July	Short Presentation & Wrap-up: Assignment 2 (Sustainable Finance)	Swiss Business History
Wed, 19 July	Study Trip Swiss Business History	Study Trip Swiss Business History
Thu, 20 July	Digital Transformation in Financial Services	Digital Transformation in Financial Services (Case Study) Social Program
Fri, 21 July		Farewell & Pictures Graduation Ceremony



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Testimonial



Testimonial I

“Despite it being the first time the summer school was held online, the team at UZH ensured that information was relayed to the students at the earliest possible time which allowed us to prepare in advance for the lessons. The adaptability of the teaching staff was really commendable and the learning experience was amazing!

The course required us to do multiple **group projects** and it gave me an invaluable opportunity to work with students all around the world. The **interactions** that we had really make this experience even more enriching.”

Marcus, National University of Singapore



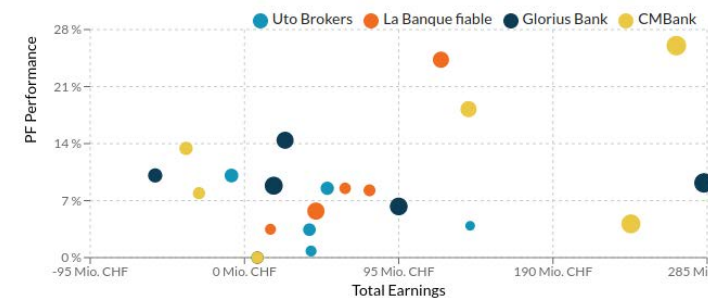
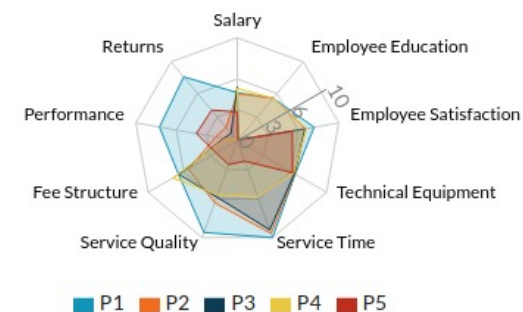
Testimonial II

“I absolutely loved the **Portfolio Management Game**, it was great fun and required us to apply our knowledge and to work meticulously to come up with good decisions for our portfolio, our customers, and our bank in general. It's a very educational, fun tool.”

Anonymous feedback on the official evaluation form from a participant of the summer school Finance for the Future



**GAME-BASED
LEARNING** ^{UZH}

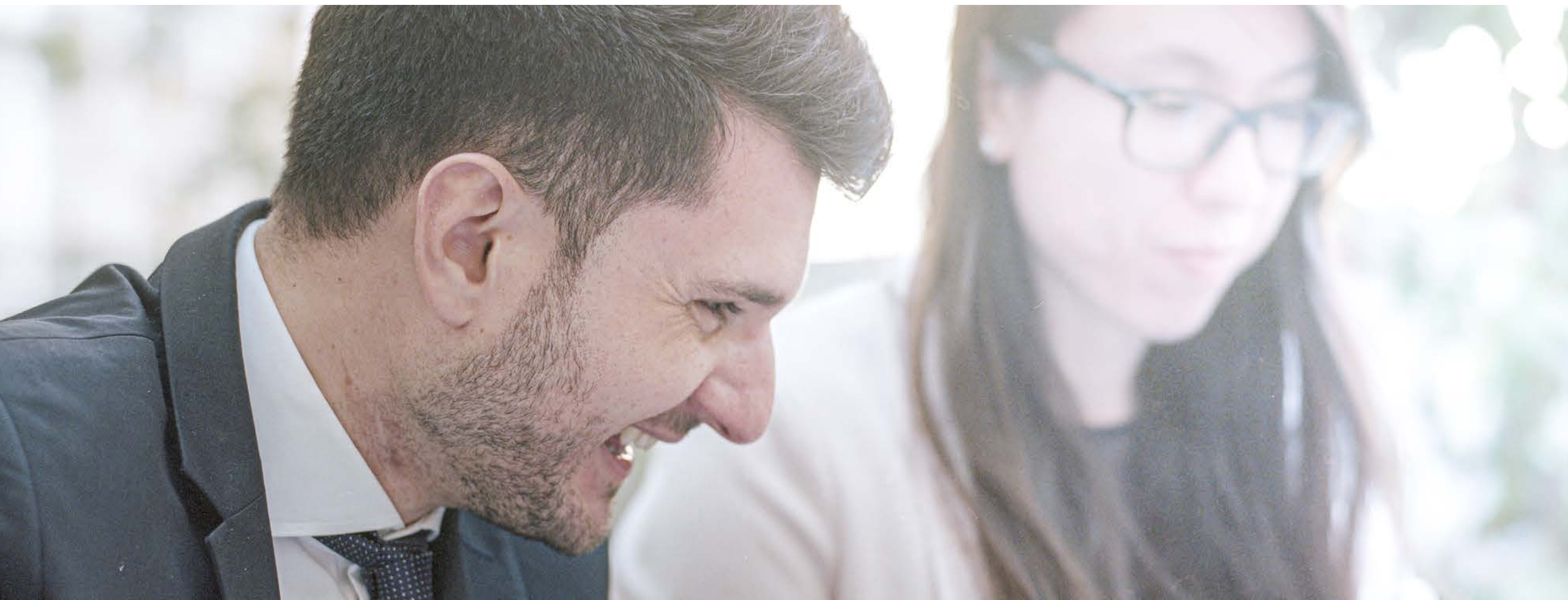




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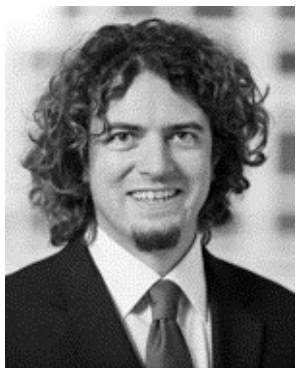
Team





Your Team from the UZH Department of Banking & Finance

We are looking forward to welcoming you to three weeks full of international experience, interesting academic and practical-oriented content in the field of investments, Sustainable Finance and FinTech as well as fun and competition within our Portfolio Management Game!



Beni



Anja



Isabelle



Stephanie



Lorenz



Your Contact at Global Student Experience

Reach out to us for questions regarding overall coordination, the social program, accommodation, travel to Switzerland, questions about UZH and the city of Zurich, issues with MS Teams, etc.

Contact our team at summer@int.uzh.ch



Nina
(Program Lead)