



**University of  
Zurich<sup>UZH</sup>**

# Summer School 2019

Finance for the Future: Sustainable Finance and  
FinTech

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

June 30 – July 19, 2019





## 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.

**Students visiting the Summer School** at the University of Zurich do not only learn theoretical aspects about finance, but also experience as well as apply their acquired knowledge in different settings at and around the campus.



## 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



Swiss Financial System



Fundamentals of Finance



FinTech



Sustainable Finance



## 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, 2018

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
- Use of FinTech in Wealth Management
- InsureTech
- Crypto Valley Zug
- Swiss Innovation Lab (UBS)



## 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, 2018

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





## Methods



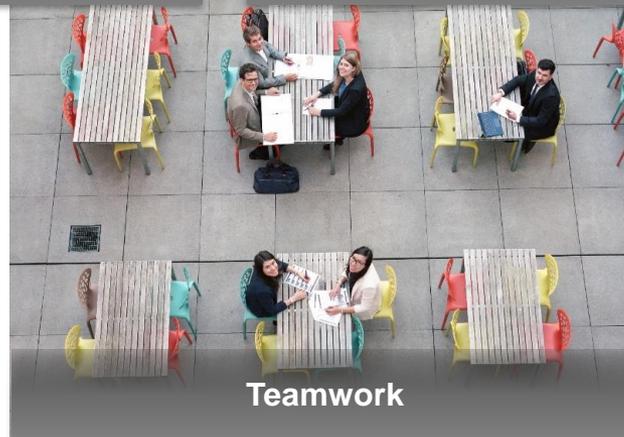
Classroom Sessions



Game-based Learning



Field Trips



Teamwork



## Lecturers and Guest Speakers

Professors and Lecturers from  
the University of Zurich



Guest Speakers from the  
Practice





**Team**



## Your Team from the Department of Banking & Finance



Beni

Anja

Sina

Isabelle