Masterclass

Mastering change in New Investment Technologies

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Why this module?

New competition and unexpected changes over the last decade have caused investment organizations to begin embracing digital transformation to fuel smarter decision making, accelerate processes, and scale operations. Leading investors will continue to explore and exploit the latest tech tools and processes to meet new challenges and opportunities head-on. This masterclass will help you identify recent technology trends and how they will impact asset managers, asset owners and technology platforms. Furthermore, how do you set a clear agenda and change the investment organization in an effective and meaningful way?

About this module

Mastering Change In New Investment Technologies provides an integral view of the latest trends and debates in the investment industry, focusing on why, how and what investment organizations need to change in their investment and operating model. Developing a strategic view on the added value of technology as it moves to the core of the investment organization will be of decisive influence for its long-term success and survival.
Through a combination of lectures, discussions and interactive cases, this intensive two-day masterclass exposes participants to the critical challenges in the changing technology ecosphere, how it creates new opportunities, affects the investment process, changes decision making or helps create new instruments. Developments are contrasted with the latest research findings. Exploring a wide range of perspectives, best practices and approaches for implementation, the program challenges you to pinpoint where your own investment organization should be strategically heading with technology.

How You Benefit

You will develop a strategic overview of the current technology market trends within investment management, and what can be learned from technology implementations in other industries. At the end of this masterclass, you will be able to help develop and critically assess realistic technology implementation strategies for your organization.

- Learn about artificial intelligence and its relation to decision making in investments, and how it drives significant growth for the global economy and provides value for society, generated by companies and governments that leverage it over the coming years. We will consider the context of ethical business decisions, as well as automation and personalization of service for investors and customers in the financial markets. You will also learn to develop your own decision intelligence, supported optimally by artificial and human intelligence.
- Learn about new, emergent technologies. Blockchain, cryptocurrencies are discussed, its (confusion about the) different roles (store, payment, ledger) and what they mean for the future of portfolio construction.
- Analyze the importance of incorporating automation and data analysis in the real estate investment process, using real-life case studies to paint a picture of how these techniques can add value. We explain how and why automation and data analysis provide tangible benefits to real estate investors, how they affect the efficiency of the investment process, facilitating analysis and helping to strip out human emotion from decision-making.

Topics

- What types of technology exist, their relation to innovation and how do they translate to business, investment and target operating models.
- Role of data: sourcing data, the use of incomplete, emergent data, what to consider when enriching it for decision making.
- Learn about new, emergent technologies, its different roles and what it means for the future of portfolio construction.
- How and where does technology influence the investment process, how will the investment process of the future look like.
- Ethical considerations when embedding artificial intelligence in decision making.

Participant Profile

Mastering Change In New Investment Technologies is designed for mid to senior professionals in the investment sector: portfolio managers, risk managers, investment advisors, who need to understand the dynamics of how technology changes the corporate strategy, investment process and decision making within investment organizations.

The masterclass is also well suited to board members and investment committee members who need a thorough understanding of the strategic opportunities and challenges of new technologies, as well as what is required at a strategic level within their organizations.

Prerequisites

There are no formal prerequisites for this course. The course is intended for investment professionals with knowledge about investment organizations and the investment industry. Participants with a background in investing will benefit most from the course.

Classes & info

Date in 2023

- 20th of October 2023 (10:00 – 20:00h)
- 3rd of November 2023 (10:00 – 17:00h)

Lecturers

Alex Brouwer (KPMG) works for KPMG, where he focuses on issues in the field of Technology and Operations, mainly in the financial sector. Alex advises clients on complex strategic issues, setting up digitally driven organizations and guides clients in the execution of change processes with a large IT component. In addition, Alex leads KPMG's IT Due Diligence practice.

Melinda Rook (KPMG, CFA Society Netherlands) has over 13 years of investment management experience and an in-depth knowledge of asset management and their operational processes. She has worked on numerous projects, outsourcing projects, front-to-back implementations, and transition management. She has a special focus on optimization of investment processes and digitalization.

Gerben de Zwart (APG) is as managing director of quantitative strategies, responsible for APG's investment portfolios that are systematically managed. Trends that have Gerben's attention are digital alpha, responsible and sustainable quant investing, alternative data/AI and model risk management.

Egbert Nijmeijer (Kempen Capital Management) is responsible for investments in listed and non-listed Real Estate funds and listed Infrastructure funds as Co-Head Real Assets. His team has successfully executed a data-driven systematic investment approach to Real Asset investments with strong focus on ESG for over a decade.

RBA Program

This masterclass can be attended standalone, but additionally qualifies as one of the required modules for the RBA program. Successful completion of all 12 modules qualifies for the RBA designation. The RBA accreditation is awarded by CFA Society Netherlands.

Registration & admission

If you would like to apply for this module or the complete RBA program, a short motivation letter and resume are requested. Admission will be based upon your pre-education and the level of relevant work experience.

Please send your application to:
annemarie.munnik@cfasociety.nl

Colophon
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