Module 8

New Investment
Technologies

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. And while no one can foresee exactly what the next years will bring, leading investors will continue to harness the latest tech tools and processes to meet new challenges and opportunities head-on. This module will help identify recent technology trends and how they'll impact the way asset managers, asset owners and technology platforms shape the investment industry.

About this module

Organizations in the investment management sector will need to adapt their operating model to the faster changing digital world. The business strategy and business goals drive the IT operating model. We will be developing a strategic view on the IT function and the IT operating model, analyzing commonalities and differences between the investment and other sectors, and considering what choices investment managers have to make to reach their business goals such as scalability, agility, innovation and cost-efficiency. The changing technology ecosphere creates new opportunities, decision-making and new instruments within the investment process. For example, understanding Artificial Intelligence is changing financial analysis, investment strategies and decision-making. 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. Another disruptive development, opening new opportunities for managers and strategies, is the increasing importance of incorporating automation and data analysis in the investment process. Using real-life case studies to paint a picture of how these techniques can add value, automation and data analysis techniques are discussed to show how they can provide benefits to investors.

Learning objectives

- Develop an overview of the current technology market trends within investment management, and what can be learned from technology implementations in other industries.
- Identify what choices an investment manager has to make to reach their business goals such as scalability, agility, innovation and cost-efficiency. Based on cases from the industry we will discuss the impact that technology has, and will have in the future, on our sector.
- Examine AI 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 the 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 services for investors and customers in the financial markets. You will learn to develop your own decision intelligence, optimally supported by artificial and human intelligence.

- Identify new, emergent technologies. Blockchain and cryptocurrencies will be discussed, (confusion about) their different roles (store, payment, ledger) and what they mean for the future of portfolio construction.
- As a concrete example we 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.

Study load & format

The module will require 10 weeks of 10-12 hours of study load, including classes. This will vary according to your pre-education and work experience.

You are expected to attend in-class lectures at TIAS School for Business and Society in Utrecht[1], which are supported by pre-readings and pre-assignments.

A variety of teaching styles, such as lecturing, guest lecturing, individual homework and assignments, group assignments, case studies, group presentations and essay writing will be used.

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[1]) depending on COVID-developments, lectures may be offered online

Designed for you?

Ideally, you are a mid to senior career professional.

Typically you work as:
- investment manager
- portfolio manager
- risk manager
- investment advisor
- fiduciary manager
- client manager
- financial analyst
- researcher

Participants could also work in a capacity of trustee, work for a regulatory authority or hold a supervisory position.

Classes & info

Dates
Wednesday March 16 - 16:30-18:00
- Online kick-off
Wednesday March 30 - 15:00-21:00
- Melinda Rook and Alex Brouwer *
Wednesday April 13 - 15:00-21:00
- Egbert Nijmeijer *
Wednesday May 18 - 15:00-21:00
- Rani Piputri *
Wednesday June 1 - 15:00-21:00
- to follow later *

* Prof. Alfred Slager RBA is our permanent lecturer and will be joined by a guest lecturer every class

Exam
A paper as take-home exam

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@cfavba.nl