



TRAINING SPRINTS 2021

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THORSTEN NEUMANN
QUANTITATIVE ASSET
& RISK MANAGEMENT SPECIALIST



MBA (LSE)
LUCA SIGNORETTI
LEADERSHIP & STAKEHOLDER
RELATIONSHIP SPECIALIST



Mag. Dr.
MATTHIAS STROLZ
ORGANISATIONAL
& BEHAVIORAL DESIGN SPECIALIST



Mag. Dr. MBA, MScFE
MARKUS SCHULLER
STRATEGIC ASSET ALLOCATION
& BEHAVIORAL DESIGN SPECIALIST



JONAS ENGLUND
GREEN FINANCE
SPECIALIST



Prof. Dr.
GREGORY GADZINSKI
INVESTMENT AUTOMATION
SPECIALIST



EASY COLLABORATION OPTIONS

A dark gray circle with a dotted brown border, containing the text "PUBLIC TRAINING SPRINTS" in white, bold, uppercase letters.

**PUBLIC
TRAINING
SPRINTS**

A dark gray circle with a dotted brown border, containing the text "EXCLUSIVE TRAINING SPRINTS" in white, bold, uppercase letters.

**EXCLUSIVE
TRAINING
SPRINTS**

A dark gray circle with a dotted brown border, containing the text "PANTHERA ACADEMY" in white, bold, uppercase letters.

**PANTHERA
ACADEMY**

A dark gray circle with a dotted brown border, containing the text "WHITE LABEL INTEGRATION OF PANTHERA ACADEMY" in white, bold, uppercase letters.

**WHITE LABEL
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EASY COLLABORATION OPTIONS

**PUBLIC
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REGISTRATION	VIA PARTNER OR PANTHERA SOLUTIONS
PLATFORM	BY PANTHERA SOLUTIONS
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LECTURER	BY PANTHERA SOLUTIONS
CERTIFICATE	BY PANTHERA SOLUTIONS
MEDIA CARDS	BY PANTHERA SOLUTIONS
FOLLOW-UPS	BY PANTHERA SOLUTIONS
SUCCESS FEE	TBD
PRICE POINT	EUR 250 <ul style="list-style-type: none">▪ PLUS VAT IF APPLICABLE▪ DISCOUNTS POSSIBLE FOR SELECTED GROUPS VIA COUPONS

THE TRAINING SPRINTS

TRAINING SPRINTS

AT A GLANCE

HUMAN INTELLIGENCE

CONFIGURE
HIGH PERFORMANCE
INVESTMENT COMMITTEES

TEST THE HALF-LIFE
OF YOUR FINANCIAL
KNOWLEDGE

IMPROVE YOUR DECISION
QUALITY WITH THE POWER
OF NETWORKS

UNDERSTAND THE
MINDSET OF YOUR
INVESTORS TO GROW
YOUR BUSINESS

ARTIFICIAL INTELLIGENCE

SHRINKING BIG DATA

PREDICTIVE MODELLING
WITH BIG DATA

CASTING YOUR AI MODEL

ECONOMETRIC
MODELLING OF CAPITAL
MARKETS

PORTFOLIO ANALYTICS
FOR INVESTMENT
COMMITTEES

RISK BUDGETING IN
ACTIVE MANAGEMENT

APPLIED ETHICS

IMPROVE YOUR
INVESTMENT HYPOTHESIS
WITH STORYTELLING

APPLY HIGH
FIVE OF PERSONAL
EMPOWERMENT

MEASURE
COGNITIVE DIVERSITY IN
INVESTMENT TEAMS

SUSTAINABILITY

INTRODUCTION TO GREEN
BOND STRUCTURING

INTRODUCTION TO GREEN
BOND DUE DILIGENCE

IMPROVING IMPACT
INVESTING WITH
CAUSALITY ANALYSIS

TRAINING SPRINTS

CATALOGUE 2021

TRAINING SPRINT	CATEGORY	PS FRAMEWORK	PS SERVICE	PS SPECIALIST
CONFIGURE HIGH PERFORMANCE INVESTMENT COMMITTEES	HUMAN INTELLIGENCE	BEHAVIOR / GROUP	PANTHERA PRIME	MARKUS SCHULLER
TEST THE HALF-LIFE OF YOUR FINANCIAL KNOWLEDGE	HUMAN INTELLIGENCE	BEHAVIOR / INDIVIDUAL	PANTHER ACADEMY	MARKUS SCHULLER
IMPROVE YOUR DECISION QUALITY WITH THE POWER OF NETWORKS	HUMAN INTELLIGENCE	BEHAVIOR / INDIVIDUAL	PANTHERA ACADEMY	LUCA SIGNORETTI
UNDERSTAND THE MINDSET OF YOUR INVESTORS TO GROW YOUR BUSINESS	HUMAN INTELLIGENCE	BEHAVIOR / GROUP	PANTHERA ACADEMY	LUCA SIGNORETTI
SHRINKING BIG DATA	ARTIFICIAL INTELLIGENCE	CHOICE ARCHITECTURE / TOOLBOX	PANTHERA TREE	GREGORY GADZINSKI
PREDICTIVE MODELLING WITH BIG DATA	ARTIFICIAL INTELLIGENCE	CHOICE ARCHITECTURE / TOOLBOX	PANTHERA TREE	GREGORY GADZINSKI
CASTING YOUR AI MODEL	ARTIFICIAL INTELLIGENCE	CHOICE ARCHITECTURE / TOOLBOX	PANTHERA TREE	GREGORY GADZINSKI
ECONOMETRIC MODELLING OF CAPITAL MARKETS	ARTIFICIAL INTELLIGENCE	CHOICE ARCHITECTURE / TOOLBOX	PANTHERA TREE	THORSTEN NEUMANN
PORTFOLIO ANALYTICS FOR INVESTMENT COMMITTEES	ARTIFICIAL INTELLIGENCE	CHOICE ARCHITECTURE / TOOLBOX	PANTHERA TREE	THORSTEN NEUMANN
RISK BUDGETING IN ACTIVE MANAGEMENT	ARTIFICIAL INTELLIGENCE	CHOICE ARCHITECTURE / TOOLBOX	PANTHERA TREE	THORSTEN NEUMANN
IMPROVE YOUR INVESTMENT HYPOTHESIS WITH STORYTELLING	APPLIED ETHICS	BEHAVIOR / INDIVIDUAL	PANTHERA PRIME	MATTHIAS STROLZ
APPLY THE HIGH FIVE OF PERSONAL EMPOWERMENT	APPLIED ETHICS	BEHAVIOR / INDIVIDUAL	PANTHER ACADEMY	MATTHIAS STROLZ
MEASURE COGNITIVE DIVERSITY IN INVESTMENT TEAMS	APPLIED ETHICS	BEHAVIOR / GROUP	PANTHER ACADEMY	MARKUS SCHULLER
INTRODUCTION TO GREEN BOND STRUCTURING	SUSTAINABILITY	CHOICE ARCHITECTURE / TOOLBOX	PANTHERA DESIGN	JONAS ENGLUND
INTRODUCTION TO GREEN BOND DUE DILIGENCE	SUSTAINABILITY	CHOICE ARCHITECTURE / TOOLBOX	PANTHERA TREE	JONAS ENGLUND
IMPROVING IMPACT INVESTING WITH CAUSALITY ANALYSIS	SUSTAINABILITY	CHOICE ARCHITECTURE / PROCESS	PANTHERA TREE	MARKUS SCHULLER

TRAINING SPRINTS

HUMAN INTELLIGENCE

CONFIGURE HIGH PERFORMANCE INVESTMENT COMMITTEES

LECTURER	Markus Schuller
LENGTH	3h
LEARNING GOAL	Learn how to configure a committee that produces the most evidence-based investment decisions.
PS FRAMEWORK	Behavior / 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 or Awarenow)
COSTS	EUR 250 per participant
MINIMUM SIZE	5 participants

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 (90min)

- 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 (10min)

PART TWO

DELIBERATE PRACTICE (60min)

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

LESSONS LEARNED (10min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

TRAINING SPRINTS

HUMAN INTELLIGENCE

TEST THE HALF-LIFE OF YOUR FINANCIAL KNOWLEDGE

LECTURER	Markus Schuller
LENGTH	3h
LEARNING GOAL	Learn how to assess the pace at which your relevant financial knowledge deteriorates and how to work against it.
PS FRAMEWORK	Behavior / Individual
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 or Awarenow)
COSTS	EUR 250 per participant
MINIMUM SIZE	5 participants

DESCRIPTION

Your knowledge as an investment professional has an expiry date. The knowledge you had when you started your career will not be enough to keep you relevant in a few years.

How long does it take for your technical and non-technical skills to lose half of its relevance? We measure your personal half-life and explore ways to strive for excellence in the relevant skills of your profile.

PROGRAM

PART ONE

BEST PRACTICES (90min)

- What is the half-life of financial knowledge
- Taxonomy of investment management skills
- Relevant technical and non-technical skills for investment professionals
- Measuring and interpreting proficiency levels of relevant skills
- Upskilling techniques for relevant skills

BREAK (10min)

PART TWO

DELIBERATE PRACTICE (60min)

Participants will assess their own half-life and explore how to keep the proficiency of their investment management skills relevant.

LESSONS LEARNED (10min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

TRAINING SPRINTS

HUMAN INTELLIGENCE

IMPROVE YOUR DECISION QUALITY WITH THE POWER OF NETWORKS

LECTURER	Luca Signoretti
LENGTH	3h
LEARNING GOAL	Learn how to improve your decision quality as an investment professional by building your most effective professional networks
PS FRAMEWORK	Behavior / Individual
CPD ACCREDITED	Yes (3 credits)
LANGUAGE	English (on-demand in French and Italian)
BENEFICIAL FOR	All investment professionals
SPRINT STRUCTURE	90min input + 60min deliberate practice, reflection and implementation planning
FORMAT	Online (Zoom or Awarenow)
COSTS	EUR 250 per participant
MINIMUM SIZE	6 participants (even number for role-plays pref.)

DESCRIPTION

In times of disruptive transformation, we need all the support we can get to keep on delivering top results. Well designed professional networks provide an additional source to improve your productivity and put you ahead of your peer.

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 (90min)

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

PART TWO

BREAK (10min)

DELIBERATE PRACTICE (60min)

Participants will apply the best practices in 1-2-1 role-playing exercises to get more comfortable with their implementation.

LESSONS LEARNED (10min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

TRAINING SPRINTS

HUMAN INTELLIGENCE

UNDERSTAND THE MINDSET OF YOUR INVESTORS TO GROW YOUR BUSINESS

LECTURER	Luca Signoretti
LENGTH	3h
LEARNING GOAL	Understand and leverage the reasons why clients decide to work with you or not.
PS FRAMEWORK	Behavior / Group
CPD ACCREDITED	Yes (3 credits)
LANGUAGE	English (on-demand in French and Italian)
BENEFICIAL FOR	All investment professionals with commercial duties
SPRINT STRUCTURE	90min input + 60min deliberate practice, reflection and implementation planning
FORMAT	Online (Zoom or Awarenow)
COSTS	EUR 250 per participant
MINIMUM SIZE	6 participants (even number for role-plays pref.)

DESCRIPTION

At the end of the day, your success in the business is defined by your clients. Whatever expertise you might count on, 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 simple 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.

PROGRAM

PART ONE

BEST PRACTICES (90min)

- Understating the decision-making process any client goes through
- The client's decision influencing factors you must know about
- 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

BREAK (10min)

DELIBERATE PRACTICE (60min)

Participants will apply the learning within their own professional context, in order to come up with implementable solutions to grow their client base.

LESSONS LEARNED (10min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

TRAINING SPRINTS

ARTIFICIAL INTELLIGENCE

SHRINKING BIG DATA

LECTURER	Gregory Gadzinski
LENGTH	3h
LEARNING GOAL	Learn how to properly use and analyze Big Data
PS FRAMEWORK	Choice Architecture / Toolbox
CPD ACCREDITED	Yes (3 credits)
LANGUAGE	English (on-demand in French)
BENEFICIAL FOR	CIOs, investment committee members, fund managers, risk and performance analysts, quants
SPRINT STRUCTURE	90min input + 90min deliberate practice, reflection and implementation planning
FORMAT	Online (Zoom or Awarenow)
COSTS	EUR 250 per participant
MINIMUM SIZE	5 participants

DESCRIPTION

The vast proliferation of data and increasing technological advances continue to transform the way industries operate and compete. Financial companies, in particular, have adopted big data analytics to gain further insights on their environment and eventually make better investment decisions.

This seminar introduces common big data tools and show how to use them in order to handle big datasets.

PROGRAM

PART ONE

BEST PRACTICES (90min)

- What is Big Data
- Big Data versus small data : the curse of dimensionality
- Mummy, I shrank a big model
- Principal Component Analysis and Partial Correlations in Networks
- Text Mining : shrinking speeches

BREAK (10min)

PART TWO

DELIBERATE PRACTICE (60min)

Participants will learn how to properly use and analyze Big Data.

LESSONS LEARNED (10min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

TRAINING SPRINTS

ARTIFICIAL INTELLIGENCE

PREDICTIVE MODELLING WITH BIG DATA

LECTURER	Gregory Gadzinski
LENGTH	3h
LEARNING GOAL	Learn how to use Big Data to make better predictions in risky and uncertain environments
PS FRAMEWORK	Choice Architecture / Toolbox
CPD ACCREDITED	Yes (3 credits)
LANGUAGE	English (on-demand in French)
BENEFICIAL FOR	CIOs, investment committee members, fund managers, risk and performance analysts, quants
SPRINT STRUCTURE	90min input + 90min deliberate practice, reflection and implementation planning
FORMAT	Online (Zoom or Awarenow)
COSTS	EUR 250 per participant
MINIMUM SIZE	5 participants

DESCRIPTION

Financial companies have widely adopted big data analytics to uncover hidden patterns that can help them make more-informed business decisions. Best forecasting principles in risky and uncertain environments are introduced and some of the widely used methodologies in machine learning are also studied.

This training sprint covers a range of forecasting tools from small data and small models to big data and big models.

PROGRAM

PART ONE

BEST PRACTICES (90min)

- Best forecasting principles
- How to avoid being fooled by randomness
- Slow tails and paradigm shifts
- Big versus small models
- Selecting good models with Big and small data

BREAK (10min)

PART TWO

DELIBERATE PRACTICE (60min)

Learn how to use Big Data to make better predictions in risky and uncertain environments.

LESSONS LEARNED (10min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

TRAINING SPRINTS

ARTIFICIAL INTELLIGENCE

CASTING YOUR AI MODEL

LECTURER	Gregory Gadzinski
LENGTH	3h
LEARNING GOAL	Learn how to use artificial intelligence models in order to optimize investment decisions.
PS FRAMEWORK	Choice Architecture / Toolbox
CPD ACCREDITED	Yes (3 credits)
LANGUAGE	English (on-demand in French)
BENEFICIAL FOR	CIOs, investment committee members, fund managers, risk and performance analysts, quants
SPRINT STRUCTURE	90min input + 90min deliberate practice, reflection and implementation planning
FORMAT	Online (Zoom or Awarenow)
COSTS	EUR 250 per participant
MINIMUM SIZE	5 participants

DESCRIPTION

Financial services have widely adopted artificial intelligence in the hope to make better investment predictions leading to consistent returns. However, if not supported by rigorous conceptual and methodological criteria, these methods can be more than misleading.

Best principles in the AI world are introduced and some of the most used methodologies in machine learning are studied.

PROGRAM

PART ONE

BEST PRACTICES (90min)

- AI in Finance
- Machine Learning explained
- Machine Learning: the danger of black boxes
- Big Data & ML : the curse of dimensionality
- Mixing human intelligence with artificial intelligence

BREAK (10min)

PART TWO

DELIBERATE PRACTICE (60min)

Participants will learn how and when to use artificial intelligence models in order to optimize their investment decisions.

LESSONS LEARNED (10min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

TRAINING SPRINTS

ARTIFICIAL INTELLIGENCE

ECONOMETRIC MODELLING OF CAPITAL MARKETS

LECTURER	Thorsten Neumann
LENGTH	3h
LEARNING GOAL	Learn how to analyse financial markets with econometrics
PS FRAMEWORK	Choice Architecture / Toolbox
CPD ACCREDITED	Yes (3 credits)
LANGUAGE	English (on-demand in German)
BENEFICIAL FOR	CIOs, investment committee members, fund managers, research analysts
SPRINT STRUCTURE	90min input + 90min deliberate practice, reflection and implementation planning
FORMAT	Online (Zoom or Awarenow)
COSTS	EUR 250 per participant
MINIMUM SIZE	5 participants

DESCRIPTION

Econometric time series models are powerful tools for market analysis.

- 1) How to determine fair values of equity, FI and FX markets?
- 2) How to explain observed market movements?
- 3) How to distinguish systematic return components from those subject to idiosyncratic forces (i.e. single events, investor behaviour etc.)?
- 4) To what extent can fundamental data forecast markets?

The course provides various sample models including R-Codes.

PROGRAM

PART ONE

BEST PRACTICES (90min)

- Fair value models
- Simultaneous market models
- Explained vs. unexplained return components
- Forecasting models

BREAK (10min)

PART TWO

DELIBERATE PRACTICE (60min)

Participants will practice market analysis based on econometric models. We will share experiences and discuss the strengths and weaknesses.

LESSONS LEARNED (10min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

TRAINING SPRINTS

ARTIFICIAL INTELLIGENCE

PORTFOLIO ANALYTICS FOR INVESTMENT COMMITTEES

LECTURER	Thorsten Neumann
LENGTH	3h
LEARNING GOAL	Learn how to analyse risk, performance and decision behaviour
PS FRAMEWORK	Choice Architecture / Toolbox
CPD ACCREDITED	Yes (3 credits)
LANGUAGE	English (on-demand in German)
BENEFICIAL FOR	CIOs, investment committee members, fund manager, risk and performance analysts
SPRINT STRUCTURE	90min input + 90min deliberate practice, reflection and implementation planning
FORMAT	Online (Zoom or Awarenow)
COSTS	EUR 250 per participant
MINIMUM SIZE	5 participants

DESCRIPTION

Advanced portfolio analytics are essential for informed investment decision making and delivering reliable performance. Focusing on top down asset allocation portfolios the course covers:

- 1) How to monitor ex ante risks?
- 2) How to monitor daily performance?
- 3) Meaningful risk and performance analysis
- 4) A self-critical look at your investment decision behaviour
- 5) Optimized risk budgeting of investment decisions

PROGRAM

PART ONE

BEST PRACTICES (90min)

- Ex ante risk modelling and monitoring
- Risk and performance analytics
- Investment decision behaviour analytics
- Risk budgeting theory

BREAK (10min)

PART TWO

DELIBERATE PRACTICE (60min)

Participants will practice portfolio analytics at illustrating examples. We will share experiences and discuss the strengths and weaknesses.

LESSONS LEARNED (10min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

TRAINING SPRINTS

ARTIFICIAL INTELLIGENCE

RISK BUDGETING IN ACTIVE MANAGEMENT

LECTURER	Thorsten Neumann
LENGTH	3h
LEARNING GOAL	Learn how to derive optimal risk budgeting from your available skill set
PS FRAMEWORK	Choice Architecture / Toolbox
CPD ACCREDITED	Yes (3 credits)
LANGUAGE	English (on-demand in German)
BENEFICIAL FOR	CIOs, investment committee members, fund managers, risk and performance analysts
SPRINT STRUCTURE	90min input + 90min deliberate practice, reflection and implementation planning
FORMAT	Online (Zoom or Awarenow)
COSTS	EUR 250 per participant
MINIMUM SIZE	5 participants

DESCRIPTION

Success is not random – only with optimized risk budgeting can investors achieve reliable success. Risk budgeting provides the framework on which single portfolio construction decisions can be built within daily work: How to allocate active risk strategically? For example: Duration? Spreads? FX? Equity vs. FI? Stock selection? The course covers:

- 1) Risk and performance potential of active management decisions
- 2) Accessing investment skills and the benefits of improved skills
- 3) How to derive optimal risk budgeting from your available skill set?

PROGRAM

PART ONE

BEST PRACTICES (90min)

- Risks, returns and skills of active management
- Optimal risk budgeting

BREAK (10min)

PART TWO

DELIBERATE PRACTICE (60min)

Participants will practice the guidelines for optimal risk budgeting. We will share experiences and discuss the strengths and weaknesses.

LESSONS LEARNED (10min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

TRAINING SPRINTS

APPLIED ETHICS

IMPROVE YOUR INVESTMENT HYPOTHESIS WITH STORYTELLING

LECTURER	Matthias Strolz
LENGTH	3h
LEARNING GOAL	Understand how to form a narrative based on evidence that supports your investment hypothesis.
PS FRAMEWORK	Behavior / 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 or Awarenow)
COSTS	EUR 250 per participant
MINIMUM SIZE	5 participants

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 (10min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

TRAINING SPRINTS

APPLIED ETHICS

APPLY THE HIGH FIVE OF PERSONAL EMPOWERMENT

LECTURER	Matthias Strolz
LENGTH	3h
LEARNING GOAL	Learn how to foster your personal empowerment and understand the organisational integration of individual change.
PS FRAMEWORK	Behavior / 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 or Awarenow)
COSTS	EUR 250 per participant
MINIMUM SIZE	5 participants

DESCRIPTION

The half-life of financial knowledge requires investment professionals to continuously work on advancing their technical and adaptive skills to stay competitive in an ambiguous market environment. Defining concrete empowerment goals offers direction for individual learning paths.

The question remains: how do I configure my learning path to make it resiliently fit into my life?

PROGRAM

PART ONE

BEST PRACTICES (90min)

- Acquiring a growth mindset – mastering volatility, uncertainty, complexity and ambiguity
- Five Competences for fostering personal capacity to decide and act under VUCA conditions
- “High Five of Personal Empowerment”: Moving from awareness, to letting go, to connectedness (Mission/Purpose), to prototyping into mastery of the new

PART TWO

BREAK (10min)

DELIBERATE PRACTICE (60min)

Integrating the High Five Model into personal context, to close the knowing-doing gap and to foster change of personal behavioral patterns.

LESSONS LEARNED (10min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

TRAINING SPRINTS

APPLIED ETHICS

MEASURE COGNITIVE DIVERSITY IN INVESTMENT TEAMS

LECTURER	Markus Schuller
LENGTH	3h
LEARNING GOAL	Learn how to measure and interpret cognitive diversity among investment professionals.
PS FRAMEWORK	Behavior / 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 or Awarenow)
COSTS	EUR 250 per participant
MINIMUM SIZE	5 participants

DESCRIPTION

Diversity matters.
Cognitive diversity matters even more for decision making.

Measuring cognitive diversity accurately, acts as a prerequisite for yielding its positive effects. This training sprint identifies relevant measures of cognitive diversity in investment management teams and how to interpret them.

PROGRAM

PART ONE

BEST PRACTICES (90min)

- What is cognitive diversity?
- Why is it relevant for investment teams?
- Qualitative and quantitative measures of cognitive diversity
- Best practices on how to interpret test results

BREAK (10min)

PART TWO

DELIBERATE PRACTICE (60min)

Participants will explore how to best measure under what circumstances.

LESSONS LEARNED (10min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

TRAINING SPRINTS

SUSTAINABILITY

INTRODUCTION TO GREEN BOND STRUCTURING

LECTURER	Jonas Englund
LENGTH	3h
LEARNING GOAL	Learn how to structure a Green Bond, perform Due Diligence & broaden your Investor Base by providing visibility through harmonization of Impact data.
PS FRAMEWORK	Behavior / Group
CPD ACCREDITED	Yes (3 credits)
LANGUAGE	English
BENEFICIAL FOR	Issuers' CEO, CFO, CSO, Legal & Compliance, Treasury, Sustainability departments, etc.
SPRINT STRUCTURE	90min input + 90min deliberate practice, reflection and implementation planning
FORMAT	Online (Zoom or Awarenow)
COSTS	EUR 250 per participant
MINIMUM SIZE	5 participants

DESCRIPTION

Green Bonds enable capital-raising and investment for new and existing projects with environmental benefits. Green Bonds are structured to adhere to the Green Bond Principles' four core components. A simple like for like concept, providing more visibility than non-Green bonds. Learn how a Green Bond is structured, how to ensure Transparency pre and post issue, how to diversify your Investor base.

PROGRAM

PART ONE

BEST PRACTICES (90min)

- Due Diligence to ensure the bond is in line with the Green Bond Framework. Internal alignment among key players.
- Issuer's Impact Reporting Commitment and ability to provide harmonized Impact Data pre issuance and when reporting Sources and Uses post issuance.
- Diversify the Investor Base by better understanding what Green Bond Investors want in term's of selling restrictions, terms, structure, Impact, reporting practices, purpose (e.g. Sustainable Development Goals) etc.

PART TWO

BREAK (10min)

DELIBERATE PRACTICE (60min)

Participants will reflect on their own Green Bond Structuring, Due Diligence and Impact Data Analysis and explore how to optimize Impact and Return and minimize Risk.

LESSONS LEARNED (10min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

TRAINING SPRINTS

SUSTAINABILITY

INTRODUCTION TO GREEN BOND DUE DILIGENCE

LECTURER	Jonas Englund
LENGTH	3h
LEARNING GOAL	Learn how a Green Bond is structured, how to perform Due Diligence and how to analyse its impact data to your advantage.
PS FRAMEWORK	Behavior / Group
CPD ACCREDITED	Yes (3 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 or Awarenow)
COSTS	EUR 250 per participant
MINIMUM SIZE	5 participants

DESCRIPTION

Green Bonds enable capital-raising and investment for new and existing projects with environmental benefits. A simple 'like for like' concept, providing more visibility than non-Green bonds. Learn how a Green Bond is structured, how to perform Due Diligence and how to Improve Impact Investing outcomes.

PROGRAM

PART ONE

BEST PRACTICES (90min)

- Green Bonds are structured to adhere to the Green Bond Principles' four core components.
- Due Diligence to ensure the bond is in line with the Sustainable Framework.
- Investors ability to Analyse Impact Data to spot "Greenwashing" and understand how environmental and financial risks and opportunities are interlinked, quantify and maximize Environmental & Social Impact through Sustainable Development Goals.

PART TWO

BREAK (10min)

DELIBERATE PRACTICE (60min)

Participants will assess their own Due Diligence, Impact Data Analysis and design their own approach of how to optimize Impact and Return and minimize Risk, while ensuring sources and uses matches the Issuer's Green Bond Framework.

LESSONS LEARNED (10min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

TRAINING SPRINTS

SUSTAINABILITY

ENHANCE SUSTAINABLE INVESTING WITH CAUSALITY ANALYSIS

LECTURER	Markus Schuller
LENGTH	3h
LEARNING GOAL	Learn how to use causality assessment tools to increase the SDG impact of your investments.
PS FRAMEWORK	Behavior / Individual
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 or Awarenow)
COSTS	EUR 250 per participant
MINIMUM SIZE	5 participants

DESCRIPTION

In 2021, 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 (90min)

- 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 (10min)

PART TWO

DELIBERATE PRACTICE (60min)

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

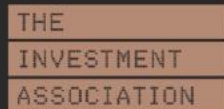
LESSONS LEARNED (10min)

NEXT STEPS (5min)

FEEDBACK FORM (5min)

WE PRIORITIZE STRONG BUSINESS COMMITMENTS.

TRUSTED BY



TRAINING SPRINTS

CATALOGUE 2021

EXPERIENCE AN ACTIVE LEARNING ENVIRONMENT
FOR DELIBERATE PRACTICE ON RELEVANT TOPICS
WITH PIONEERING PANTHERA SPECIALISTS

FEATURES	SPRINT STRUCTURE		PARTNER STRUCTURE	
3 HOURS	STANDARDIZED PANTHERA OPENING		REGISTRATION	BY PANTHERA
1 PANTHERA SPECIALIST	TOPIC INPUT	90 MIN	PLATFORM	BY PANTHERA
ONLINE DEFAULT // ON-SITE AVAILABLE	BREAK	10 MIN	CONTENT	BY PANTHERA
ENG DEFAULT // GER - FRE - ITA AVAILABLE	DELIBERATE PRACTICE	60 MIN	LECTURER	BY PANTHERA
FIRST ON ZOOM - THEN ON AWARENOW	LESSONS LEARNED	10 MIN	CERTIFICATE	BY PANTHERA
CENTRALIZED ONLINE REGISTRATION	NEXT STEPS	5 MIN	MEDIA CARDS	BY PANTHERA
CPD ACCREDITED	FEEDBACK FORM	5 MIN	SUCCESS FEE	AS AGREED
EUR 250 (+ VAT IF APPLICABLE)			DISCOUNT (MAX)	EUR 200
PAYMENT BY PAYPAL, CC OR BANK TRANSFER				
MINIMUM PARTICIPANTS	5			

TRAINING SPRINT CERTIFICATES



**EMBRACE THE DISRUPTION.
MAKE THE CHANGE.
TAKE THE FIRST STEP.**

**GET BETTER.
ACT BETTER.
PERFORM BETTER.
WITH US.**



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