



1-DAY WORKSHOP ON

FINANCIAL TECHNOLOGY

DIGITAL BANKING AND THE 4TH INDUSTRIAL REVOLUTION



Participation Fee: Rs 12,000 per delegate



Batch 1
14 JUNE 2017

Batch 2
15 JUNE 2017



09:00 - 16:30



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OVERVIEW OF THE WORKSHOP

The First Industrial Revolution used water and steam power to mechanise production. The Second used electric power to create mass production. The Third used electronics and information technology to automate production. Now a Fourth Industrial Revolution is characterized by a fusion of technologies that is blurring the lines between the physical, digital, and biological spheres. It is affecting the financial industry already.

\$4.7 trillion in revenue for traditional financial services is at risk of being displaced by new technology-enabled entrants.

FinTech is changing rapidly with new sub-sectors emerging all the time, drawing in new names and organisations taking a customer centric view of financial services.

The course is designed to provide a comprehensive overview for people either working in or interested in innovating in this space creating products and access to services supported by technology. We encourage critical thinking in participants and present the latest thinking and knowledge in this area.

LEARNING OUTCOMES:

After the course, participants will be able to

- Recognise the importance of FinTech.
- Identify areas where FinTech will revolutionise your banking and finance business.
- Appreciate the changes required in trading and sales.
- List the threats to the banking industry.
- Understand the urgency to take action now to save the business.
- Spot business development opportunities.
- Explain some of the new technologies available.
- Recognise FinTech start-up companies.
- Identify already existing threats from non-banks.

WHO SHOULD ATTEND?

- Senior bankers and managers.
- Decision makers in financial institutions.
- Traders in any asset class.
- Investment managers in any asset class.
- Investors in any asset class.
- Treasury sales.
- Mergers and acquisitions.
- Corporate financiers.
- Corporate treasurers.
- Asset and fund managers.
- Asset and liability managers.
- Members of ALCO.
- Private bankers.
- Wealth managers.
- Corporate treasurers.
- Regulators and compliance officers.
- Liquidity managers.
- Central bankers.
- Ministry of Finance.
- Lawyers in banking and finance.
- Accountants.
- Project managers.
- IT managers.



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COURSE DETAILS

INTRODUCTION

- Setting the frame
- Session outline
- Introductions
- Expectations

THE 4TH INDUSTRIAL REVOLUTION

- Mechanisation
- Digitalisation
- Internet
- Large data and the sharing economy

EXAMPLES OF CHANGING BUSINESS MODELS WITH LARGE DATA

- The sharing economy
- Education
- 3-D printing
- Medicine and Hygiene
- Transportation
- Neurotechnology
- Recruitment

COMPETITION FOR BANKS

- New purely online banks
- Shadow banks

SHADOW BANKING

- Securitization, structured investment vehicles (SIV)
- Asset-backed commercial paper (ABCP) conduits
- Money market mutual funds
- Markets for repurchase agreements (repos)
- Mortgage companies
- Hedge funds
- Private equity funds
- Securities broker dealers
- Credit insurance providers

BANKING THE FUTURE

– THE DIGITAL BANK

- The Bank of the Future – 24/7/365
- Banking Millennials (Gen Y)
- The payments technology arms race
- Block chains and the future of currency
- Currencies without a central bank
- Biometrics and cybersecurity
- The rise of the robo private banker
- Peer-to-peer lending & crowdfunding

FINTECH: TECHNOLOGICAL CHANGE

- The client service oriented bank
- Blockchain technology
- Digital currencies (Bitcoin)
- Virtual currencies
- Cashless payment systems
- Removal of cash

FINTECH START-UPS

- Types
- Services
- Capital base
- Examples

COURSE SUMMARY

- Debrief
- Feedback

FINTECH: HOW BANKING AND FINANCE IS AFFECTED

- Retail banking
- Wholesale banking
- Investment banking
- Corporate finance
- Asset management
- Lending
- Regulation

DIGITALISATION OF BANKING SERVICES

- Electronic trade execution
- Payment/settlement systems
- Money transfers
- Wealth management and private banking
- Trading
- Risk management
- Asset and liability management
- Liquidity management
- Use of social media

IMPLICATIONS TO THE BANKS

- Investments
- Jobs
- Profitability



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YOUR PRESENTER



PETROS GEROULANOS
LIC.OEC. HSG, ASSOC.CIPD, MNLP

- Principal of EPIGON Training & Development
- Chairman of EPIGON Marketing AG, Switzerland
- Managing Director EPIGON Energy GmbH
- Member of the Association of NLP (ANLP Intl. Ltd)
- Member of the American Institute of Hypnotherapy
- Member of the Association of TimeLine Therapy™

CURRENT FOCUS:

- Finance for Energy Projects
- Options Trading

Petros is the principal consultant for EPIGON Training & Development offering training. As former head of VEGA Structured Finance GmbH in Stuttgart, Germany, he introduced ABS and ABCP transactions to medium-sized corporates.

After completing the first econometric study of unlisted Swiss stocks at the University of St. Gallen, he joined Swiss Bank Corporation to trade currencies options in London. He used his expertise to develop equity exotic options after the integration of the O'Conner team. From there he completed his trading experience on the Swaps and Fixed Income Derivatives desk.

Petros then joined Guildhall Limited, a risk management boutique, where he implemented interest rate training and trading systems for large UK corporates. There he was approached by the UK Knowhow Fund to develop bond markets, initially in Russia and then in Poland. Eventually, he spends a significant amount of time developing interest rate, bond and credit markets around the world.

He has a degree in economics from St. Gallen Business School, is a visiting lecturer at SKEMA business school in Paris and former visiting lecturer at City University Business School (now known as CASS). He has published more than 400 FX related articles in the Swiss media, has co-authored two books, written an interactive CD-ROM on financial markets and developed a distance learning pack on international bonds.

Petros is both an experienced trader and trainer. His strengths lie in his lively presentation style, the cross cultural approaches and the integration of historic developments with current market events.

He has been involved in training bankers in countries such as Germany, Switzerland and the UK. As a financial markets product trainer he has also been conducting seminars for more than 20 years in other countries in particular in Hong Kong, Malaysia, Singapore, South Africa, Thailand, Turkey and the USA.

Petros is also trained to train Mind Management Skills such as Speed Reading, Memory Techniques and Neuro-Linguistic Programming. He is an Associate of the Chartered Institute of Personnel and Development (Assoc. CIPD) and an affiliate of the Chartered Institute of Securities and Investment. He is a certified facilitator with a number of other bodies. He has been tutoring people of all walks of life to achieve their dreams and perform their duties.

Since 1998 he has been a certified Master NLP Practitioner, a member of the Association of NLP (ANLP), a certified Hypnotherapist under the auspices of the American Institute of Hypnotherapy as well as certified in Time Line Therapy™. He is also available as coach for people with learning difficulties.

Petros works with major international banks, medium sized investment houses, private equity and hedge funds, corporates, rating agencies, regulators and government agencies whilst still continuing to trade all asset classes.