Contents
RoboAdvising: understanding a new wave of financial technologies and methods.

Educational aims

Financial Technology (FinTech) is one of the fastest growing sectors of technology, and is impacting and redefining several financial sectors. Roboadvisors – or, better, InvesTech - is transforming the financial services industry at an accelerated pace, and further disruption in the near future is almost certain. In this course you will:
- learn how digital technologies are shaping and disrupting the present and future of wealth management;
- apply financial theories and methods to build technology solutions that solve practical digital investment problems;
- get an introduction to relevant Data Science applications.

Syllabus

- Introduction to fintech and roboadvisors: overview of the underlying economics, the technology, policy issues, the competition, the relationship between Fintech firms and incumbents.
- Focus on roboadvisory: main features.
  - Regulatory framework (EU).
  - Methods and techniques for roboadvisory:
    - Customer engagement;
    - Portfolio construction;
    - Risk Management for FinTech;
    - Digital advisory (customer profiling, adequacy requirements, product mapping);
    - Data Analytics;
    - Introduction to FinTech Data Science.
- The customer (i.e. the investor) journey: key elements.

Teaching methods
Lectures with business examples, notes, and discussion – this short course is designed to be higly interactive - in some instances, discussion will be centered on lectures. The aim is to deepen your understanding of the scope, the methods and economics of InvestTech, and encourage your creative and entrepreneurial spirit.

Lecturer

Raffaele Zenti - Co-founder of VirtualB SpA (owner of the brand "AdviseOnly", first Italian roboadvisor), where he leads the Financial Data Science team, and board member of Fondaco SGR. An academic background in Statistics and Quantitative Finance, he was Head of the Quantitative Portfolio Management team in Allianz Global Investors Italy, and later in Banca Leonardo, before founding AdviseOnly. Lecturer at the University of Novara and Polytechnic University of Milan, he published various articles in asset management and financial journals, including the Journal of Asset Management, Economic Notes, Artificial Intelligence and Cognitive Science.