



Venice - March, 1st

Scuola Grande di S. Giovanni Evangelista

9:00 – 9:30	REGISTRATION
9:30 – 10:00	<p>Prof. Ruggero Bertelli (Università di Siena)</p> <p>Using Golden Ratio to create reliable model portfolios</p> <ul style="list-style-type: none">• Trust and behavioral finance• Natural rules in finance• Model Portfolios as an investing guide• The Golden Ratio matters
10:00 – 10:45	Investments Speed Dating: ACTIVE FUNDS vs. ETFs
10:45 – 11:15	COFFEE BREAK
11:15 – 11:45	<p>Luca Rosiello (CEO Keller Zable)</p> <p>Keller Zable Wealth Management Data Analysis</p> <ul style="list-style-type: none">• Il Wealth Management applicato al Real Estate
12:00 – 12:30	<p>Joseph Camilleri (Executive Head Business Development and Corporate Services , BOV Fund Services)</p> <p>Malta: Innovazione e Crescita</p> <ul style="list-style-type: none">• Da Crypto-Currency funds, a Notified AIFs, a Ridomiciliazioni
12:30 – 13:00	Investments Speed Dating: CERTIFICATES
LUNCH BREAK	

SALA CONFERENZE: FORBES LIVE

14:30 – 16:00

Disruption, quale futuro per i servizi finanziari nell'era del Fintech

- Come si svilupperà il modello di investment del futuro
- Quali saranno gli impatti del Fintech sull'industria del risparmio, e i ruoli di tecnologie di frontiera quali l'intelligenza artificiale e la Blockchain
- Come gli asset manager stanno costruendo portafogli focalizzati su tali tecnologie

Conduce: Oscar Giannino (Responsabile Forbes Live).

Intervengono:

- Stefania Lucchetti (Partner, King & Wood Mallesons)
- Filippo Roncarati (Relationship Manager – Retail Distribution, Credit Suisse AM)
- Giancarlo Sandrin (Head of Asset Management Client iShares)
- Paolo Sironi (FinTech Thought Leader, IBM Watson Financial Services)

16:00 – 16:15

COFFEE BREAK

16:15 – 17:30

Mifid II: soluzioni per la consulenza del futuro

- Quale bilancio trarre dai primi mesi di applicazione della Direttiva in Italia
- Quali profili di criticità sono emersi. Quali le soluzioni adottate
- Focus sulle nuove norme relative ad appropriatezza e adeguatezza e ai poteri di intervento attribuiti alle autorità di vigilanza
- Cosa cambia per consulenti e fund selector

Conduce: Marco Barlassina (direttore FORBESITALIA.com)

Intervengono:

- Riccardo Lamanna (Country Head Italy di State Street Global Services)
- Denis Masetti (Presidente di Blue Financial Communication)
- Mauro Panebianco (Partner di PwC e Awm Consulting Leader Italy)
- Andrea Peratiti (Head of Regulatory Reporting, Point Nine Limited)

14:00 – 17:30

SALA COLONNA:

EIF - EXCLUSIVE INVESTMENT FORUM

19:30 – 23:00

DIAMAN AWARDS GALA DINNER

(on invitation only for Asset Managers)

9:00 – 9:30	REGISTRATION
9:30 – 10:00	Welcome by Riccardo Esposito & Daniele Bernardi
10:00 – 10:30	<p><i>Michele Bonollo (Sr Risk Expert at Numerix, Adjunct Professor of Mathematical Finance at Università degli Studi di Verona)</i></p> <p>The financial risk measure in the PRIIPS regulation. Some issues. (Paper of M. Bonollo and D. Chinzi)</p> <ul style="list-style-type: none"> • The summary risk indicator • The product categorization for the financial risk. • The risk measures methodologies in the regulation. Facts, Problems
10:30 – 11:00	<p><i>Kristoff Zammit Ciantar (CEO, Aquibix)</i></p> <p>Automating Compliance: The challenges, the solutions and the innovation</p>
11:00 – 11:30	COFFEE BREAK
11:30 - 12:00	<p><i>Marcello Minenna (Director of the Quantitative Analysis Unit. Adjunct Professor of Stochastic Finance at London Graduate School of Mathematical Finance and at Luigi Bocconi University of Milan)</i></p> <p>A quantitative methodology for risk assessment in financial products</p> <ul style="list-style-type: none"> • Enhancing the informational value of the product price: a three pillars approach • Recovering information about potential returns with finite partitions of the implicit probability distribution • How to frame liquidity risk over the time horizon of the investment with first passage time probability distribution • Volatility measures for the estimate of the overall riskiness of non-equity investment products
12:00– 12:30	<p><i>Paolo Sironi (Thought Leader – IBM Watson Financial Services)</i></p> <p>Which is the financial product or solution that justifies the fees in the age of MIFID2 transparency</p>
12:30 – 13:00	<p><i>Damiano Brigo (Chair in Mathematical Finance and Stochastic Analysis, Imperial College London)</i></p> <p>The evolution of valuation and of the quant profession</p> <ul style="list-style-type: none"> • From complex products in simple environments • to simple products in complex environments • The eclectic nature of the quant profession today

LUNCH BREAK

14:00 – 14:30	<p>Paolo Tasca (<i>Director Centre for Blockchain Technologies, University College London</i>)</p> <p>Risks and Challenges of Initial Coin Offerings</p> <ul style="list-style-type: none"> • Technical Risks • Financial Risks • Regulatory and Legal Risks
14:30 – 15:00	<p>Daniel Heller (<i>FinTech and blockchain technology expert</i>)</p> <p>What is money in 2030?</p> <ul style="list-style-type: none"> • Advantages and disadvantages of digital currencies • Regulatory issues • Implications for the financial sector
15:00 – 15:30	<p>Daniele Sestagalli (<i>CEO of the Zulu Republic, Tech Entrepreneur and Trust Minimization Evangelist</i>)</p> <p>Zulu Republic: Blockchain, Voluntary Nations, and the Future of Individual Sovereignty</p>
15:30 – 15:45	<p>COFFEE BREAK</p>
15:45 – 16:15	<p>Dennis O’Callahan (<i>Director, Product Development Cboe Global Markets</i>)</p> <p>The Growth of Bitcoin and the Progression to a Futures Contract</p> <ul style="list-style-type: none"> • Bitcoin Basics – an Exchange’s Perspective • Cboe’s Bitcoin Futures – Product Specifications and Why They Were Chosen • Early Observations of Cboe Bitcoin Futures Trading
15:15 – 16:45	<p>Daniele Bernardi (<i>CEO Diaman SCF</i>)</p> <p>Platform for Hybrid Investment explained</p> <ul style="list-style-type: none"> • Why is very important that digitalization help the advisors • How the crypto can improve the return in the portfolio • What is the future od wealth management
16:45	<p>END-OF-WORK COCKTAIL</p>

EFPA/CFA Crediti disponibili
per chi frequenta 2 giorni di formazione