



Barcelona  
School of  
Management

# FINANCE AND INNOVATION

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London, 24 – 26 March 2021

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# 1. UPF Barcelona School of Management

Our mission is to educate our students to allow them to go on to lead companies, institutions and projects promoting innovation, social transformations, commitment to culture and global wellbeing.

In order to achieve our mission, we aim to impact people, organizations and society, with our raison d'être to contribute to global wellbeing.

Apart from producing and transmitting knowledge, our founding principles are as follows:

- A global outlook
- Plurality, in order to integrate diversity and boost interdisciplinarity
- Autonomy, in order to ensure teaching, organisational and financial capacities.
- Ongoing innovation and improvement, in order to meet the needs of a changing environment
- Ethics as the grounding for all actions taken
- Equality, incorporating the best talent in order to guarantee equal opportunities
- Rigour and excellence in teaching, research, knowledge transfer and management
- A transformative attitude: taking risks and learning from mistakes
- Best practices: taking national and international benchmarks into account in order to push for continual improvement
- Empathy: always evaluating others' work with the knowledge that they are doing their best
- Critical thought: expressing disagreements in a constructive fashion.

We understand management as the ability to make ideas, projects and even dreams a reality, no matter the field of knowledge or professional sector.

Welcome to UPF Barcelona School of Management!

Oriol Amat

Dean of UPF Barcelona School of Management

## **2. Course description**

This course brings the opportunity to make three days of total immersion in companies and institutions of the financial, technological and banking field of the city of London, the most direct way to know the different work alternatives offered by the consulting and finance sectors.

### **Objectives**

The main objective is to learn about the realities on the leading international companies in the Fintech, Banking, investment and financial sectors. The course is not just a great opportunity to have a firsthand approach to the industry, but also to receive insightful seminars from top senior managers of these prestigious institutions. The seminars will provide diverse learning techniques on investment decisions, valuation, M&A and monetary policy at the very exciting time of the Brexit process.

### **Methodology**

The seminars will be given by top managers of each institution. Some of them include case studies, and all of them will be real experience based. Later on, the student submits a report as stated in the evaluation criteria section.

Methodology may vary due to COVID19 pandemic situation.

### **Participants**

The seminar is open as an elective course for participants in the Executive Master in Business Administration and Master in Accounting and Financial Management (depending on modality) Contact your program manager for further information.

### 3. Agenda

Hours	March 24rd	March 25th	March 26th
<b>Morning</b>	<b>Bank of England</b> Monetary Policy	<b>London Stock Exchange</b> Opening and seminar	<b>Silicon Valley Bank</b> New banking solutions
<b>Afternoon 1</b>	tbd	<b>Barclays Rise Accelerator</b> Fintech	<b>Goldman Sachs (tbc)</b> Investment bank
	Break	Break	<b>Closure</b>
<b>Afternoon 2</b>	<b>Capula Investment Management</b> Hedge Fund	<b>Oak North</b> Unicorn Valuations	Check-out
<b>Evening</b>	Free time	<b>Networking dinner</b>	

*\*agenda may vary due to unforeseen circumstances*

#### Tuesday, March 23<sup>rd</sup> 2021

Check in at Hotel upon arrival.

20.00: Briefing meeting (tbc) (optional) Hotel reception.

#### Wednesday, March 24<sup>th</sup> 2021

08.30: Meeting at Hotel.  
Walking distance.

09.00: VISIT 1: **Bank of England**  
Photo ID mandatory - [location](#)

12.00: VISIT 2: **EY or Deloitte (tbd)**  
**location**

14.00: Lunch break – Free time

15.45: Meeting at Green Park Station.

16.00: VISIT 3: **Capula Investment Management**  
[location](#)

18.00: Free time

### Thursday, March 25<sup>th</sup> 2021

- 07.00: Meeting at Hotel – Punctuality required  
Walking distance
- 08.30 (tbc): VISIT 1: **London Stock Exchange**  
[location](#)
- 12.00: VISIT 2: **Barclays Rise Accelerator**  
[location](#)
- 14.00: Lunch Break – Free time
- 15.45: Meeting at Oxford Circus Underground Station
- 16.00: VISIT 3: **Oak North**  
[location](#)
- 19.00: **Networking dinner**  
Venue: tbd  
Set menu included

### Friday, March 26<sup>th</sup> 2021

- 09.00: Meeting at Hotel  
Walking distance
- 09.30: VISIT 1: **Silicon Valley Bank**  
[location](#)
- 12.00: VISIT 2: **Goldman Sachs (tbc)**
- 14.00: Closure

## 4. Contents

**Barclays Rise** is an accelerator for technology startups. It is also a "hub" of the Fintech sector where there are different organizations that promote the growth of companies that are part of the acceleration program.

❖ Seminar on the 10 trends that will change the world of Fintech 2020 by the general manager of Barclays' innovation department and Techstars, the Rise and Barclays' accelerator.

**Capula Investment Management** is one of the largest Hedge Fund in Europe. They currently control and manage assets worth 17 billion dollars. While they have offices in Tokyo, Hong Kong and the United States, the London office is the largest.

❖ Seminar on the most applied part of a Hedge Fund, showing the particularities of the "buy side" of the capital and asset markets in obtaining maximum returns. The seminar will feature a senior analyst and a "trader" or a programmer, to see different perspectives of a company with these characteristics.

**London Stock Exchange** It is the largest stock exchange in Europe and one of the most important in the world. From the London Stock Exchange they control different capital markets, from the Premium to markets for emerging companies.

❖ We are invited to the Stock Market Opening and small reception



❖ Seminar: The seminar focuses on several of the four areas of action of the LSE led by a responsible of each area: (1) Capital markets; (2) Bonds; (3) Clearing House; (4) Emerging markets and green economy. HR will talk about the LSE graduate program.

**Goldman Sachs** is the largest Investment and Securities Banking group in the world. They work in different sectors, including: banking investment, financial advice for companies, asset management and valuation services.

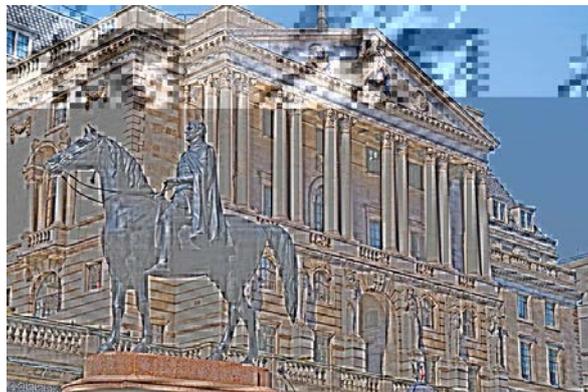


❖ Case-Study Seminar: Real cases handled by Goldman Sachs will be treated. Session where students must solve specific situations to deepen hands-on learning based on real situations. Possible issues: The macro situation of the moment - IPOs of companies that GS has managed - Mergers and acquisitions - Asset and account management.

**Oak North** is a commercial bank that specializes in providing financing to SMEs through a solvency analysis system that exponentially speeds up the financing allocation process. This has led it to be one of the few unicorns (companies valued at more than US \$ 1 billion) that has benefits. They currently have offices in London, New York and Delhi.

❖ Seminar. The seminar analyzes the success story of this young Fintech. OakNorth has a unique SME financing proposal that has led it to reach the unicorn valuation faster than any other Fintech in the history of the United Kingdom or Europe.

**Bank of England** is the Central Bank of the United Kingdom. It is the regulator and promoter of monetary policy through the Policy Committee. It is also responsible for maintaining financial stability in the country. Founded in 1694, it is one of the oldest central banks in Europe.



❖ Seminar to discuss in depth some of the areas that the Bank of England works. A responsible for each area will specifically address: - monetary policy - financial stability - financing of the financial system.

- ❖ Visit to the facilities

**Silicon Valley Bank** is a high-tech commercial bank. They specialize in financing startup companies and have already helped more than 30,000. SVB is one of the largest commercial banks in the United States and already has offices in London, China, India, Israel and Germany.

- ❖ Seminar: the seminar focuses on the decision-making process to grant financing prominently to companies in losses. SVB is currently negotiating with Spanish banks to penetrate this market. This process will be discussed in the seminar.

## 5. Evaluation Criteria

Students will present a final project for evaluation of this course-experience.

The project needs to demonstrate the concepts learnt during the seminars, along with the intakes of the vibrant historical time that the UK and the city of London is going through.

Each student will analyze the impact of the Brexit on one of the different areas examined in the course: Banking sector, Fintechs, Investments, regulation of monetary policy.

The **document** should have between **10-15 pages**, and will consider:

- The current situation of the “matter” of choice
- Strengths and weaknesses of the “matter”
- Pros and cons of a soft and hard Brexit on the “matter”
- Conclusions and recommendations

Students are required to attend 80% of classes. Failing to do so without justified reason will imply a zero grade in the participation/attendance evaluation item and may lead to suspension from the program

Students who fail the course during the regular evaluation are allowed one re-take of the evaluation, in the conditions specified above. If the course is again failed after the retake, the student will have to register again for the course the following year.

Plagiarism is to use another’s work and to present it as one’s own without acknowledging the sources in the correct way. All essays, reports or projects handed in by a student must be original work completed by the student. By enrolling at any UPF BSM, students acknowledge that they understand the schools’ policy on plagiarism and certify that all course assignments will be their own work, except where indicated by correct referencing.

## 6. Contact persons

### Professor

[Luz Parrondo.](#)

E-mail: [luz.parrondo@bsm.upf.edu](mailto:luz.parrondo@bsm.upf.edu)

She is a finance-accounting professor and head of the financial and accounting department at UPF-Barcelona School of Management. PhD in Economics, Finance and Management awarded by Pompeu Fabra University (UPF). As a researcher, she specializes in the study of financial management with particular focus on the impact of new technologies such as Blockchain, earnings management, risk management and corporate social responsibility. Since 2015, she coordinates the professional journal RCD and as a professional, she had worked as Financial Controller and as a Financial Manager in several SMEs in Barcelona.

### Student Coordinator

[Luis Rosso](#) - Tel. 0034 935 421 829 / 0064 689 522 406

E-mail: [luis.rosso@bsm.upf.edu](mailto:luis.rosso@bsm.upf.edu)

Please address any question or request regarding the logistics or personal circumstances to the student coordinator.

## 7. How to get there

### London

It is recommended to arrive on 22th March in the afternoon / evening, as the activities will start early on the morning of 1st April. Each student is responsible for his/her own travel arrangements, as well as for the visa (if needed)

### Hotel



#### **Ibis London City - Shoreditch**

[location](#): 5 Commercial Street

London E1 6BF

+44 (0) 20 7422 8400

[Website](#).

Metro station: Aldgate East Station

A bed in a Twin Room and breakfast are included. If an upgrade is required, depending on availability, the participant shall bear the cost.

Public transportation card will be provided by the student coordinator.

## 8. General recommendations

Please regard the agenda and be punctual.

Please stay with the group during the visits. If you are missing one visit for any reason, please let the student coordinator know.

Keep your documents with you in any moment. You might be asked to show a valid ID to check in for a visit. You will need to show a photo ID (passport or driving license) to gain entry to the Bank of England.

Dress code: business casual. Please avoid high heels and uncomfortable shoes as you are expected to walk and get into public transportation.

General good behavior and politeness in visits and hotel is expected.

Do not hesitate to ask the student coordinator in case of any doubt.

The meals included in the program are the hotel breakfast and the networking dinner (extra orders like room service or out-of-menu dishes would be charged apart)

**Note:** This document is for informational purposes only. Course contents and agenda may change due to unforeseen circumstances.

### Legal Disclaimer

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