



45th AFTER-WORK LECTURE ON ASSET & INVESTMENT MANAGEMENT

THURSDAY, 16 MAY 2019

CHAIR IN BUSINESS ADMINISTRATION, BANKING AND FINANCIAL MANAGEMENT
INSTITUTE FOR FINANCE

SUSTAINABLE INVESTING WITH PASSIVE SOLUTIONS: RETURNS WITH IMPACT

- *Dominik Blunsch*
UBS AG, Asset Management, Zurich, Switzerland

After-Work Lectures on Asset and Investment Management

Series of lectures on current developments in Asset and Investment Management. Exchange of ideas amongst professionals of Corporations, Banks, Asset Management, Investment and Insurance Companies, Financial Advisory Services, Tax Administration, Lawyers, Trustees, Fund Managers and Financial Auditors.

Abstract

Sustainable investing (SI) has evolved. No longer just a “nice-to-have” for policy makers, regulators and investors, SI is now high on the agenda, and investors are looking for ways to incorporate sustainability and responsible investing into their portfolios.

Today, whatever an investor’s specific SI requirements might be, a broad range of approaches exist, which vary greatly in their sophistication. They encompass relatively simple exclusionary offerings, through products which integrate material ESG factors within the research process, to sustainability-focused strategies which look to address a specific theme, such as gender or water scarcity, and ultimately, sophisticated impact-driven solutions which carry an explicit intention to generate a measurable social and environmental impact alongside financial return. That proliferation is reflected in both active and passive strategies, with particularly strong growth witnessed in the passive and ETF space. In Europe alone, there has been an almost 50% increase every year over the past five years in assets under management measured against indices constructed around ESG factors.

The presentation examines the evolution of ESG investing in the passive space, with a particular focus on the development of SI indices and benchmarks.

Speaker

Dominik Blunschli has been with UBS Asset Management since November 2012, and is responsible for developing and implementing the UBS ETF business in Switzerland and Liechtenstein. In this role, Mr Blunschli works closely with institutional clients, banks and asset managers in helping to provide ETF-based solutions for their investment strategies. Prior to joining UBS Asset Management, Mr Blunschli worked several years for Credit Suisse and later with Zürcher Kantonalbank in Portfolio and Investment Consulting roles responsible for UHNW client coverage. Mr Blunschli holds a Master of Advanced Studies (MAS) in Banking & Finance and a Bachelor of Science (BSc) in Business Administration from the FHNW University of Applied Sciences and Arts, Northwestern Switzerland.

CE Qualified Activity

This event is a CE Qualified Activity and earns CFA Institute members 1.0 CE credits. For further information, please refer to the back of this brochure.

Programme

Thursday, 16 May 2019

Welcome and Introduction

05.30 p.m. *Dr. Lars Kaiser*
Assistant Professor
Chair in Business Administration, Banking and Financial Management

Sustainable Investing with Passive Solutions: Returns with Impact

05.40 p.m. *Dominik Blunski*
Director, Passive & ETF Specialist Sales Schweiz & Liechtenstein
UBS AG, Asset Management, Zurich, Switzerland

Discussion

06.30 p.m. Chair: *Dr. Lars Kaiser*

Closing Words

06.40 p.m. *Tobias Schwabe-Fährmann, CFA*
President of the CFA Society Liechtenstein

Apéro

06.50 p.m. A p é r o a n d E x c h a n g e o f I d e a s

General Information

Participants

Professionals from Corporations, Banks, Asset and Investment Management Companies, Insurance Companies, Financial Advisory Services, Tax Administration, Lawyers, Trustees, Fund Managers and Financial Auditors. Graduate and undergraduate students with interest in investments and finance.

Location

University of Liechtenstein, Vaduz
Lecture Hall 1 (H1)

Time

Thursday, 16 May 2019
05.30 - 07.00 p.m.

Fee

Free of charge. Advance registration required.

Registration

For registration visit www.uni.li/awl or send an e-mail to banking@uni.li.

Deadline for Registration

Monday, 13 May 2019

Contact and Information

Dr. *Lars Kaiser*, Assistant Professor, Chair in Business Administration, Banking and Financial Management, Institute for Finance, University of Liechtenstein, Vaduz

Assistant: *Anna-Maria Cornal*, University of Liechtenstein, Institute for Finance,
T +423 265 13 49, banking@uni.li

Discussion:

Feel free to submit questions in advance until Monday, 13 May 2019 to Mrs. *Cornal*, Institute for Finance, banking@uni.li.

Sponsor of CFA Society Liechtenstein:



LIECHTENSTEINISCHER
BANKENVERBAND

Executive MBA in International Asset Management

Aufgrund von zahlreichen regulatorischen Anforderungen im Asset Management sind Anlageentscheidungen teilweise etwas in den Hintergrund gerückt. Doch das Pendel schlägt zurück und technologische Neuerungen (z.B. Blockchain-Technologie und Robo-Advisory), Produktentwicklungen (Smart Beta und Faktorportfolios), die Nachfrage nach nachhaltigen Finanzanlagen und stetige makroökonomische Veränderungen erfordern eine Anpassung und Weiterentwicklung der Anlageentscheidungen. Dieser Studiengang bereitet Sie auf die kommenden Herausforderungen im Asset Management vor. Start: jeweils im September.

www.uni.li/emba-iam

MBA in Corporate Finance & Accounting

Der deutschsprachige MBA-Studiengang bietet die Möglichkeit, das Finanz- und Rechnungswissen in Zeiten volatiler Finanzmärkte, dem derzeitigen Niedrigzinsumfeld und erhöhter regulatorischer Vorschriften zu erweitern. Durch die Zusammenarbeit mit einem technologieorientierten MBA im Grundlagenstudium entstehen einzigartige, interdisziplinäre Netzwerkeffekte. Mit nur 2 Tagen Präsenzzeit pro Monat (Freitag und Samstag) über einen Zeitraum von 18 Monaten, zuzüglich einer Masterthesis, erlangen Sie den akademischen Grad «Master of Business Administration (MBA)». Start: jeweils im Juni.

www.uni.li/mba-corporatefinance

Master (MSc) in Finance

The MSc in Finance is an internationally recognized Master's degree programme of 4 semesters, grants 120 ECTS credits and is currently one of the few English programmes in the German speaking area, that focuses on Asset and Wealth Management and International Financial Management. This Master's degree programme is unique thanks to its international approach, practice-oriented curriculum and its personal touch with students.

www.uni.li/master-finance

CFA Society Liechtenstein

The CFA Society Liechtenstein is an official member society of the CFA Institute. Its origins date back to January 2006 when it was set-up by 15 founding partners and today counts over 100 members. By becoming a recognised society of the CFA Institute, members are granted access to a variety of valuable resources and international conferences.

www.cfainstitute.org/learning/continuingeducation

CE Qualified Activity

The CFA Institute recommends members complete a minimum of 20 hours of CE activities, including 2 hours in the content areas of Standards, Ethics, and Regulations (SER), each calendar year. The CFA Society Liechtenstein has determined that this event qualifies for 1.0 CE credit hours.

www.cfainstitute.org/learning/continuingeducation



BERUFSBEGLEITENDE WEITERBILDUNG **EXECUTIVE-MASTERSTUDIEN- GÄNGE (LL.M./EMBA)**

• **EMBA in International Asset Management**

- Asset und Wealth Management, Derivate, Risikomanagement, Invest-
mentstrategien, Alternative Investments, Investmentfonds

• **LL.M. im Bank- und Finanzmarktrecht**

- Liechtensteinisches, europäisches und internationales Finanzmarktrecht
(MiFID II, CRD IV, CRR, Solvency II, AIFMD, UCITS V, 4. Geldwäscherichtlinie,
PSD II, etc.)

• **LL.M. im Gesellschafts-, Stiftungs- und Trustrecht**

- Nationales und Internationales Gesellschaftsrecht; Stiftungsrecht:
FL, AT, CH, DE; Trustrecht: FL, UK sowie ergänzend HK, SG, USA

• **LL.M. in International Taxation**

- Nationales und Internationales Steuerrecht, Steuerkooperation (DBA, AIA, BEPS),
Steuerstandards, Steuerplanung: LI, AT, CH, DE – EU/EWR – HK, LU, SG, UK, USA

Interdisziplinäre Verbindung

- Kostenfreier Besuch von Modulen der jeweils anderen Executive-
Masterstudiengänge
- Gemeinsame Studienreise nach Hongkong und Singapur
- Grenzüberschreitende und interdisziplinäre Fallstudien zum Private
Wealth Management



MASTER OF BUSINESS ADMINISTRATION (MBA) IN CORPORATE FINANCE & ACCOUNTING

Grundlagen der Betriebswirtschaftslehre

11 Module, 22 ECTS-Punkte

Vertiefung Corporate Finance & Accounting

6 Module, 22 ECTS-Punkte

Modul 1 | 4 ECTS-Punkte

Finanzierung und Kapitalstruktur

Modul 2 | 3 ECTS-Punkte

Rechnungslegung und Bilanzanalyse

Modul 3 | 5 ECTS-Punkte

Internationale Unternehmensfinanzierung und Finanzmärkte

Modul 4 | 5 ECTS-Punkte

Risikomanagement und Derivate

Modul 5 | 3 ECTS-Punkte

Mergers und Acquisitions

Modul 6 | 2 ECTS-Punkte

Fallstudien zur Unternehmensfinanzierung und Bilanzierung

Master Thesis

2 Module, 16 ECTS-Punkte

Zeitraum

Jeweils ab Juni, 3 Semester + Thesis,
Unterricht jeweils Freitag bis Samstag
(alle 3 – 4 Wochen)

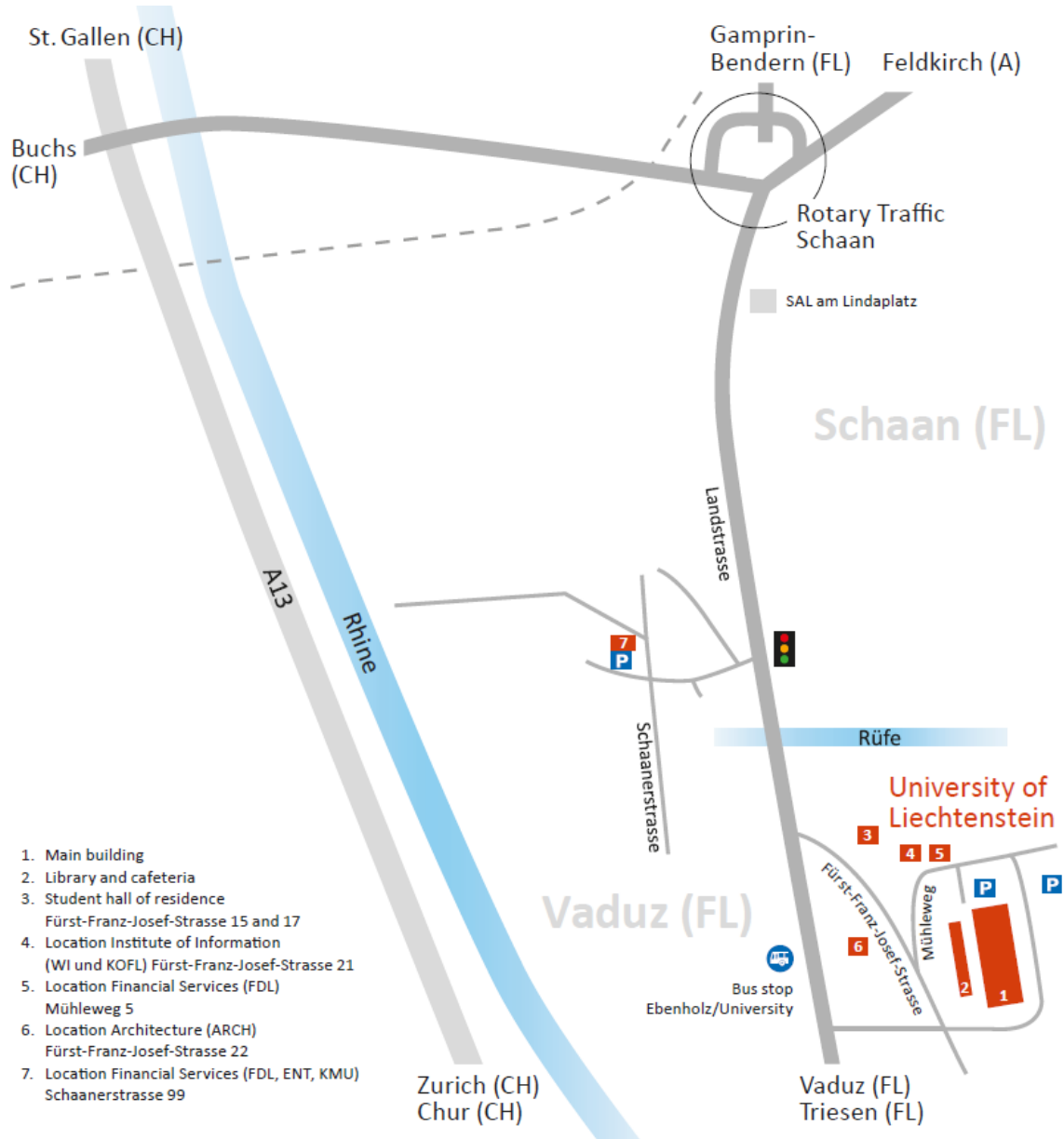
Informationen

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Studiengangsleitung

Prof. Dr. Marco J. Menichetti
Prof. Dr. Michael Hanke
Hendrik Peer Kimmerle, M.Sc.

Location



1. Main building
2. Library and cafeteria
3. Student hall of residence
Fürst-Franz-Josef-Strasse 15 and 17
4. Location Institute of Information
(WI und KOFL) Fürst-Franz-Josef-Strasse 21
5. Location Financial Services (FDL)
Mühleweg 5
6. Location Architecture (ARCH)
Fürst-Franz-Josef-Strasse 22
7. Location Financial Services (FDL, ENT, KMU)
Schaanerstrasse 99