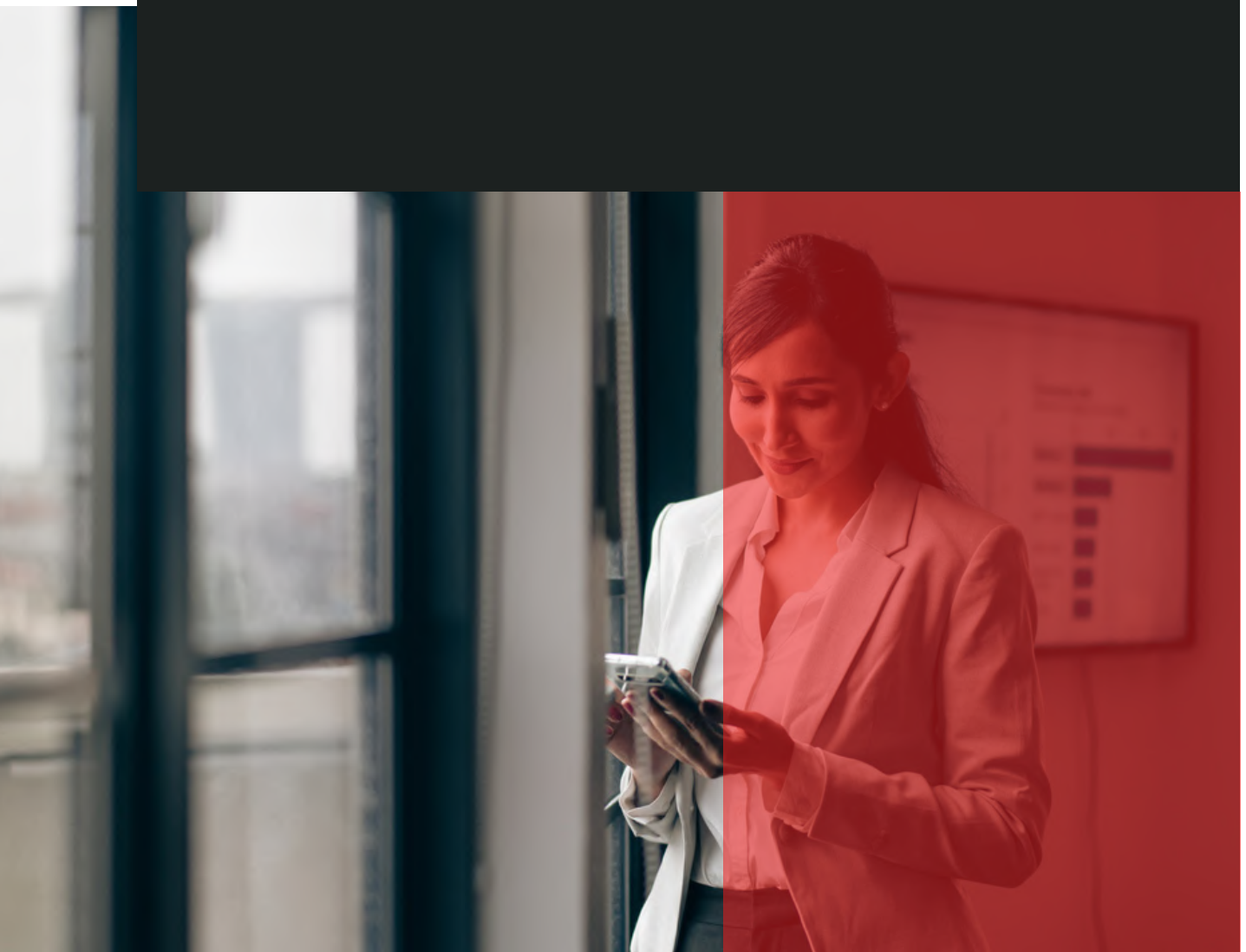


# INTRO TO THE CITY COURSES

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INTUITION®

2022 / 2023

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# Financial Markets - Essentials

## Overview

The financial markets are complex and use lots of jargon. Whether joining a consulting firm, a support function, or a technology firm, it is important to understand the language of the financial markets and be able to engage appropriately with the firm's customers.

## Learning Objectives

- Understand why we need financial markets
- Understand the role of banks and asset managers in financial markets
- Understand the needs of corporate and financial customers
- Be aware of the key commercial pressures in the business
- Know the asset classes and their investment characteristics
- Understand the importance of risk management and how this is impacted by external events



# Investment Banking - Essentials

## Overview

This programme focuses on the needs of major corporates and how investment banking firms address them. We explore client motivations and concerns, and review typical solutions offered to clients. We also consider investment banks' principal risks and how these are managed.

## Learning Objectives

- Understand the needs of corporate and financial institution clients
- Understand how those needs differ from a commercial banking client
- Understand the services offered to these clients
- Know how the bank earns fees from its services
- Understand the impact of ESG and sustainability on the business
- Consider some of the potential conflicts for advisory firms and how these are managed
- Understand the importance of risk management and how this is impacted by external events

# Commercial Banking - Essentials

## Overview

This programme focusses on the needs of commercial clients and how the bank's services support them. We explore the risk environment and how this is impacted by external events. It also considers regulation and how this influences the business day-to-day.

## Learning Objectives

- Understand the needs of commercial banking clients
- Overview of the principal services offered to these clients
- Understand the credit risk in the business and how this is managed
- Operational risks in the business e.g. know your customer (KYC), cyber risk, and conduct risk and what happens when things go wrong
- Understand the potential impacts of ESG and sustainability on the business
- Be aware of the key commercial pressures and the impact of legacy and fintech competitors

# Asset Management - Essentials

## Overview

This programme focusses on the asset management business. We introduce the clients, the investible assets, and the key types of investment wrappers. We discuss asset allocation and how it varies with client need. We also look at the risks in the business including pricing of illiquid securities, and lock-in periods.

## Learning Objectives

- Understand where the buy-side / asset management firms fit within the financial markets
- Consider the customer motivations for using an asset manager
- Know the main asset classes and their investment characteristics
- ESG and sustainability and its impact on the business
- Understand the key operational risks in the business and how they are managed
- Be aware of the key commercial pressures in the business



# Private Banking - Essentials

## Overview

This session is designed to provide an overview of wealth management. Wealth management is a customer-focussed business, and we will therefore be looking at the needs of customers, and how the firm meets those needs. We will also be giving an overview of the broader context of financial markets including banks, asset managers, and corporates.

## Learning Objectives

- Understand how we segregate the client base
- Understand the needs of wealth clients
- Be aware of the product offering including payments, credit, and asset management
- Understand the risks involved in the business and how they can be mitigated

# Risk - Essentials

## Overview

External events such as the pandemic, conflicts, and financial crisis have all had a profound impact on risk management both for individual banks and the overall financial system. Megatrends such as digitalisation and ESG & sustainability also act as major disruptors. This programme looks at all risks that banks take but then focusses on risks specific to trading and investing. We will cover credit risk, including counterparty credit risk, market risk, liquidity risk and operational risk.

## Learning Objectives

- Know that risk management is key to the operational management of all financial institutions and how this is impacted by external events
- Know what counterparty credit risk is and that credit risk is the largest risk for banks
- Know that evidencing suitability of the firm's products is a key element of managing conduct risk
- Be able to explain market risk at an individual trade level and in a portfolio
- Know what value at risk is
- Understand liquidity risk and how this is managed
- Understand the trade and settlement process and where the risks are found
- Be able to list the subcategories of operational risk and where one might see them



# Testimonials

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## ○ Top 5 UK Asset Manager

*Really enjoyable session. Working in support services it's so useful to have a clear understanding of financial markets and asset management.*

## ○ European Universal Bank

*I've not worked in commercial banking before, it's very helpful to get an overview of the products and risks.*

## ○ Leading Private Bank

*I now feel much more confident about what our firm does and the markets it operates in.*

## ○ Global Investment Bank

*In the operations area, you tend to be task-orientated. It's great to get the big picture in terms of the range of services we provide.*

# About Us



## 90% OF BANKS

We work with c.90% of the world's largest universal banks as well as 70-80% of the top investment management and wealth management organisations globally.



## 2M LEARNERS

We educate around two million learners every year in digital, virtual, and face-to-face settings.



## AWARD-WINNING

- Strategic Leader in the Fosway 9-Grid for Digital Learning in 2022.
- Gold medalist winner in the 2022 Brandon Hall Awards.
- Gold medalist winner at the 2022 Learning Awards.
- Training Industry Top 20 Online Learning Library - 2021



# Contact Us

If you'd like to learn more about the Intro to the City programme from Intuition, please contact us via the link below.

[CLICK HERE](#)

