



ONLINE COURSES

INVESTMENT DECISION
ARCHITECTS™



**A LEADING APPLIED
BEHAVIORAL FINANCE
SPECIALIST**

AWARDS



CPD MEMBER



**PANTHERA
ACADEMY**



The CPD-accredited **PANTHERA ACADEMY** bundles all activities of **PANTHERA SOLUTIONS** in capacity building and academic research with the mission to shape the field of Applied Behavioural Finance to the benefit of professional investment management.

BRIDGE BUILDER



TRAINING

ACADEMY

SOLUTIONS

**BEHAVIOR
TECH**

RESEARCH

**SOLUTIONS
DEVELOPMENT**

COACHING

CONSULTING

ONLINE LEARNING



**DELIBERATE PRACTICE
VIA ACTIVE LEARNING**

In our online and on-site Seminars, Workshops and Simulations, we apply a multidisciplinary, constructivist form of learning, where participants develop their adaptive and technical skills in a holistic instead of a subject-based approach.

**Interactive. Contextual.
Real World Learning. Learner Centered.**

TESTIMONIALS TRAINING



PARTNERS TRAINING



DEUTSCHE BÖRSE
GROUP



BME
SPANISH EXCHANGES



BiB Budapest
Institute
of Banking



AZEK
SWISS TRAINING CENTRE FOR
INVESTMENT PROFESSIONALS




ZAGREBAČKA BURZA
THE ZAGREB STOCK EXCHANGE



 **BAYFIELD**



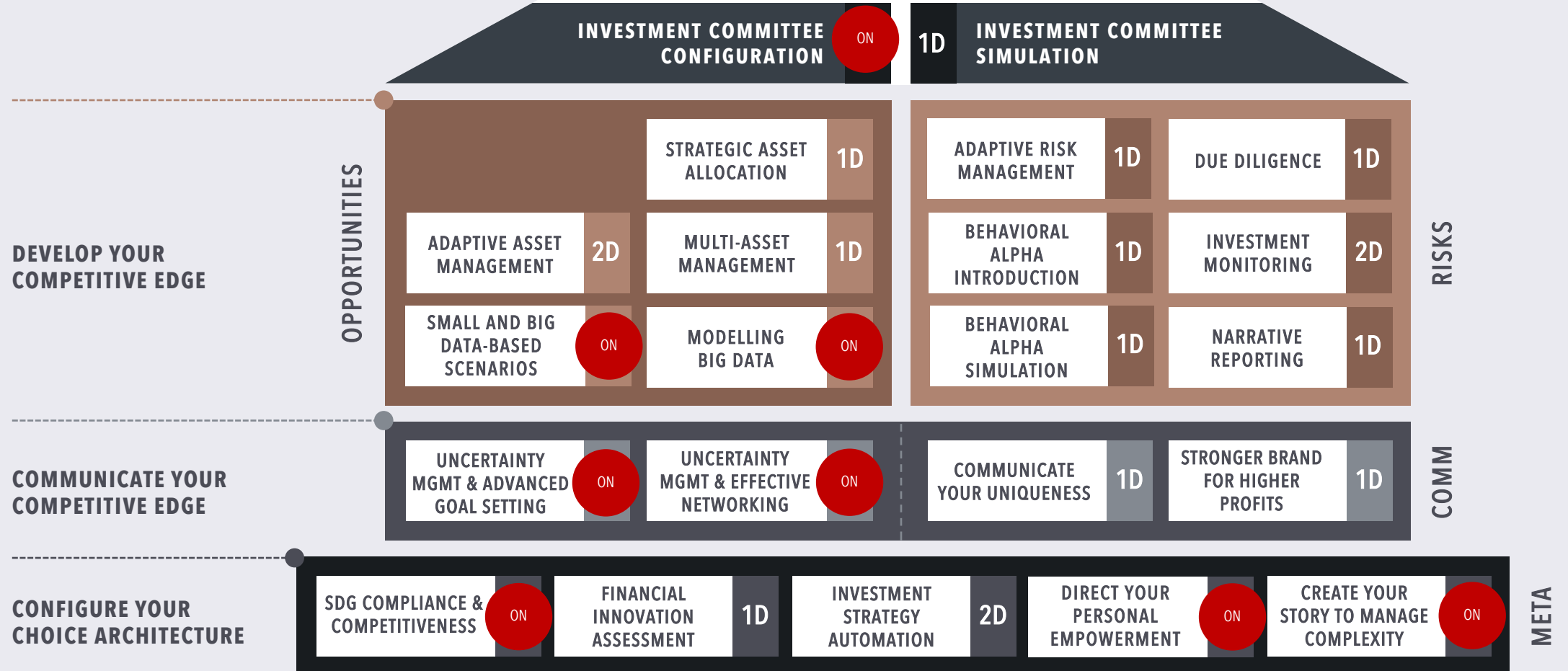
PANTHERA ACADEMY

SEMINAR CATALOGUE 2020



ALSO OFFERED ONLINE

INVESTMENT COMMITTEE



SDG COMPLIANCE & COMPETITIVENESS

1

09:00
-
12:00

INTRODUCTION TO SDG COMPLIANCE & ASSET ALLOCATION

INTRODUCTION TO A CULTURE OF COMPLIANCE

- Adaptive Markets & Innovative Specialization
- Integrating Ethics, Compliance and Innovative Specialization
- Evolution of SDG Compliance
- Introduction to 3rd generation asset allocation
- Impact investing and causality analysis
- Rulebook versus Playbook

BEHAVIORAL CONSIDERATIONS & NARRATIVE REPORTING

BEHAVIORAL CONSIDERATIONS

- Individual empowerment
- Team configuration
- Choice architecture configuration

INTRODUCTION TO NARRATIVE REPORTING

Instruments to strengthen a culture of compliance are introduced via practical examples.

2

09:00
-
12:00

BEST PRACTICES IN NARRATIVE REPORTING

DECISION SUPPORT SYSTEMS & NARRATIVE REPORTING

Methods to strengthen the self-organization of investment teams that lead to a competitive edge.

CASE STUDY

Participants will study their own investment process and explore how to optimize it by applying previously introduced narrative reporting techniques.

PRESENTATION & REFLECTION

REVIEW YOUR FINDINGS

Moderated by the lecturer, participants share their findings and reflect together on eventual further improvements of their own or other findings.

CASE STUDY
SDG-focused narrative reporting for your own case

ONLINE-COURSE DESCRIPTION

How to maximize your impact on Sustainable Development Goals (SDG) and stay competitive. In 2020, sustainable investing is a hotter than ever topic and it's clear that finance professionals can no longer allow themselves to ignore environmental, social, and governance (ESG) issues in their investment analysis and decisions. Treating your compliance with SDGs as a fig-leaf topic for marketing reasons is no longer possible.

Regulators are clear. In the years ahead, SDG compliance will not be another checklist exercise for boards, investment committees or portfolio managers. Professional investors cannot delegate their responsibility for understanding which impact they generate to rating agencies, ESG databases or external consultants. Simply put, being SDG-compliant offers an opportunity for investment decision makers to strengthen their comparative advantage through innovative specialization.

Narrative reporting not only enables investors to comply with regulation, but also to utilize the regulatory pressure for producing better investment decisions. Narrative reporting strengthens the comparative advantage of an investor through first principle thinking, investment narrative assessment and a causal understanding of capital markets. In this online course you will explore and test how to combine both, your SDG compliance, while increasing your competitiveness through narrative reporting.

SEMINAR DETAILS

LECTURER Mag. Dr. Markus Schuller, MBA, MScFE
DURATION 2 x 3h
LANGUAGES English (also available in German)
GROUP SIZE Online

LEARNING GOALS Learn how to use smart documentation techniques to stay compliant while utilizing the collected information for internal knowledge management.

TARGET GROUPS

- Family Offices / Multi-Family Offices
- Wealth Managers
- Private Banks
- Regional Banks
- Trusts
- Finance Director
- Financial Analyst
- Corporate Treasurer
- Management Consultant
- Performance Manager



MODELLING BIG DATA

A SOURCE OF COMPARATIVE ADVANTAGE

1

BIG DATA INTRODUCTION

MAKING AND GETTING BIG DATA

- What is Big Data
- What is Data Science ?
- Downloading Data in R

09:00
-
12:00

CASE STUDY IN R
Visualizing data with R

2

BIG DATA MANAGEMENT

SHRINKING BIG DATA

- Outliers Detection
- Principal Component Analysis
- Partial Correlations in Networks

09:00
-
12:00

CASE STUDY
Data as networks

3

AUTOMATING BIG DATA MANAGEMENT

BIG DATA AND MACHINE LEARNING

- Big data and Machine Learning explained
- Classification Trees
- Logistic Regressions
- Neural Networks

09:00
-
12:00

CASE STUDY
Forecasting credit data

4

PREDITIVE DATA MODELLING

- Model Selection
- Mummy, I Shrank a Big VAR Model
- Selecting Several Good Models
- Text Mining

09:00
-
12:00

CASE STUDY
Forecasting your data

ONLINE-COURSE DESCRIPTION

Today companies have adopted big data analytics to uncover hidden patterns that can help them make more-informed business decisions. "Modelling Big Data" offers practical guidance on how to properly use and analyze Big Data.

The vast proliferation of data and increasing technological advances continue to transform the way industries operate and compete. Financial companies, in particular, have adopted big data analytics to gain further insights on their environment and eventually make better investment decisions. This Online-seminar introduces common big data tools for practitioners and show them how to handle big datasets and apply big data methodologies in a range of problems from risk management to forecasting loan default with machine learning.

All together, participants get empowered through practical tools that can be applied back at their desk to fit their particular needs.

SEMINAR DETAILS

LECTURER Gregory Gadzinski, PhD
DURATION 4 x 3h
LANGUAGES English (also available in French)
GROUP SIZE Online (max 20)

LEARNING GOALS Learn how to build intelligent tools and automate your complex tasks.

TARGET GROUPS

- (Multi-) Family Offices
- Wealth Managers
- Private Banks
- Regional Banks
- Trusts
- Finance Director
- Financial Analyst
- Corporate Treasurer
- Management Consultant
- Performance Manager
- Legal & tax advisor



SMALL AND BIG DATA-BASED SCENARIOS

NOWCASTING, FORECASTING AND THE POWER OF ALTERNATIVE SCENARIOS

1

WELCOME & INTRODUCTION

A PRIMER ON PREDICTIONS

09:00
12:00

- How to get better at predictions
- How to avoid being fooled by randomness
- Slow tails and paradigm shifts

CASE STUDY:
Computing and updating your likelihood matrix

2

BEST PRACTICES IN NOWCASTING

HOW TO BE AHEAD OF THE CURVE

09:00
12:00

- Best forecasting principles
- Trend versus noise
- Big models vs. small models

CASE STUDY:
Nowcasting macroeconomics data with key indicators

3

FORECASTING AND MACHINE LEARNING

CASTING AN AI MODEL

09:00
12:00

- Big data versus small data : the curse of dimensionality
- Machine learning : the danger of overfitting
- Mixing human intelligence with AI

CASE STUDY:
Forecasting credit data

4

SCENARIOS IN ASSET MANAGEMENT

BUILDING SCENARIOS

09:00
12:00

- Defining states of the world
- Stress testing your portfolio
- Market driven vs. subjective scenarios

CASE STUDY:
Asset allocation with regime changes

ONLINE-COURSE DESCRIPTION

Financial companies have widely adopted big data analytics to uncover hidden patterns or unknown correlations that can help them make better predictions and thus more-informed business decisions. However, if not supported by rigorous methodological criteria, these methods can be more than misleading.

This seminar covers a range of forecasting tools from small data and small models to big data and big models. Best forecasting principles are introduced and some of the most used methodologies in machine learning are also studied. Participants will learn how to create plausible alternative scenarios and assess their impact on their investments.

With this online course, participants will now understand how to use scenarios in their decision making process.

All together, participants get empowered through practical tools that can be applied back at their desk to fit their particular needs.

SEMINAR DETAILS

LECTURER Dr. Gregory Gadzinski
DURATION 4 x 3h
LANGUAGES English (also available in French)
GROUP SIZE Online

LEARNING GOALS Learn how to build plausible scenarios by using small and big data management techniques.

TARGET GROUPS

- Family Offices / Multi-Family Offices
- Wealth Managers
- Private Banks / Regional Banks
- Investment companies
- Trusts
- Finance Director
- Financial Analyst
- Corporate Treasurer
- Management Consultant
- Performance Manager



UNCERTAINTY MANAGEMENT & ADVANCED GOAL SETTING

ENHANCING INDIVIDUAL PERFORMANCES IN UNCERTAIN TIMES WITH ADVANCED GOAL SETTING

1

THE ESSENTIAL PERSONAL PERFORMANCE TOOL

WHY GOAL SETTING IS AN ESSENTIAL PERFORMANCE BOOSTER

- The multiple key advantages of goal setting
- The science behind goal setting
- The psychology of reaching your goals
- How to overcome the obstacles to effective goal-setting

09:00
-
12:00

2

DEFINE YOUR GOALS WITH A PROVEN METHOD

A STEP-BY-STEP GUIDED PROCESS TO SET YOUR GOALS

- Get maximum clarity about your goals
- Define your priorities
- Capture the big picture of your expected results
- Define your gaps on your way to your goals

09:00
-
12:00

WORKBOOK #1
Guided goal setting session

3

TRANSFORM YOUR GOALS INTO EFFECTIVE LEARNING PATHS

DEFINE THE BEST PLAN TO REACH YOUR GOALS

- Skill/Knowledge plan (learning)
- People plan (collaboration)
- Individual Learning Path configuration
- Tips on how to stick to your Individual Learning Path

09:00
-
12:00

WORKBOOK #2
Guided configuration of your individual learning path

4

SMALL GROUPS COACHING SESSION

GROUPS OF ONE HOUR EACH DURING WHICH PARTICIPANTS CAN :

- Address specific challenges
- Clarify individual learning paths
- Learn from other participants' experience
- Ask any question they want

09:00
-
12:00

ONLINE-COURSE DESCRIPTION

In these uncertain times, a finance professional can significantly benefit from the directional clarity of a goal-setting process to keep achieving great results. The benefits of goal-setting at an individual level are academically evident and practically proven. In this webinar, you will learn how to maximize the advantages of goal-setting based on best practices. They will help you to be significantly more effective in reaching your professional and personal goals. Imagine, less than 10% of professionals have defined clear goals. Those who did take an advantage from it through a clearly guided individual learning path.

Goal setting is the starting point of many performance improvement activities. It is a clear must for anyone and during these webinars you will be guided step-by-step throughout an advanced goal-setting process. Additionally, at the end of this course you will be able to attend a coaching session where in small groups, you can receive personalized feedback on your personal challenges and eventual obstacles you have encountered, and you want to solve. This is a unique opportunity offered by this program.

SEMINAR DETAILS

LECTURER Luca Signoretti, MBA
DURATION 4 x 3h
LANGUAGES English (also available in French and Italian)
GROUP SIZE Online

LEARNING GOALS No one can reach any goal if they don't define them with maximum clarity. Performances are significantly improved when we can focus our limited resources like time and energy toward a clear main goal. It enables us to follow a well defined and guided individual learning path.

TARGET GROUPS

- (Multi-) Family Offices
- Wealth Managers
- Private Banks
- Regional Banks
- Trusts
- Finance Director
- Financial Analyst
- Corporate Treasurer
- Management Consultant
- Performance Manager



DIRECT YOUR PERSONAL EMPOWERMENT

1

HIGH FIVE OF PERSONAL EMPOWERMENT & SYSTEMIC INTEGRATION MODEL

09:00
12:00

- Acquiring a growth mindset – mastering volatility, uncertainty, complexity and ambiguity
- Five Competences for Fostering Personal Capacity to Decide and to Act under VUCA-Conditions
- "High Five of Personal Empowerment": Moving from Awareness, to Letting Go, to Connectedness (Mission/Purpose), to Prototyping into Mastery of the New

THE RELEVANCE OF YOUR CHOICE ARCHITECTURE

- Modelling Integration of Strategy, Structure, Culture and Execution in the Organisational Environment

2

CONFIGURE YOUR INDIVIDUAL LEARNING PATH

09:00
12:00

- Case Studies & Intervention Drafting
- Participants will introduce their own cases: using the setting of group coaching to integrate mindset of personal empowerment, to close the knowing-doing gap and to foster change of personal behavioural patterns.

TEST YOUR INDIVIDUAL LEARNING PATH

- Structured Feedback Loops, Peer Coaching, Executive Performance Coaching

**DRAFTING TAILOR-MADE
INTERVENTIONS FOR
PERSONAL GROWTH**

ONLINE-COURSE DESCRIPTION

The half-life of financial knowledge requires investment professionals to continuously work on advancing their technical and adaptive skills to stay competitive in an ambiguous market environment. Defining concrete empowerment goals offers direction for individual learning paths.

The question remains: how do I configure my learning path to make it resiliently fit into my life?

In this course you will learn how to build a resilient learning environment for your professional future? Why is irritation parenting innovation? How to get connected with a strong "Why"? How to get into prototyping and move on towards personal mastery as an investment professional? If we do not define ourselves, we will be defined – by internal or external competitors and related dynamics. We run the risk of losing our focus.

These days, smart pandemic recovery management includes working on your individual learning path. Invest in your own empowerment. Embrace innovative techniques for advancing your skills as professional investor. Become a change agent for your investment team.

SEMINAR DETAILS

LECTURER Mag. Dr. Matthias Strolz
DURATION 2 x 3h
LANGUAGES English (also available in German)
GROUP SIZE Online

LEARNING GOALS Learning Goals: Fostering your personal empowerment, integrating a personal growth mind set, understanding organisational integration of individual change. Expand your tool kit for personal growth and organizational intervention. Be the change and ride innovation.

TARGET GROUPS

- Regional Banks
- Private Banks
- Foundations
- (Multi-) Family Offices
- Manager
- Advisor
- Management Consultant



CREATE YOUR STORY TO MANAGE MARKET COMPLEXITY

STORYTELLING FOR INVESTMENT PROFESSIONALS

1

09:00
-
12:00

INTRODUCTION TO SUCCESSFUL STORYTELLING

- What is a/your story?
- How does your story connect with your mission and purpose?
- Principles und Success Factors of Storytelling
- Methodology of Framing & Story Implementation
- Best Practices on how to convert evidence into a narrating investment hypothesis

NARRATIVE REPORTING FOR INVESTMENT HYPOTHESES

- Best Practices on how to convert evidence into a narrating investment hypothesis

2

09:00
-
12:00

DRAFTING MY STORY & GETTING READY TO IMPLEMENT

- Case Studies & Feedback-Session
- Participants will introduce their own cases and optimize their approaches by exploring expert's und peers' feedback.
- Implementation Planning

IMPROVE YOUR OWN FRAMEWORK

- Designing tailor-made strategy for gaining internal support for conveying your story and implementing it in the management framework.

**TAILOR-MADE
IMPLEMENTATION OF YOUR
OWN CASE.**

ONLINE-COURSE DESCRIPTION

Stories eat numbers for breakfast.

This ageing knowledge acts as a double-edged sword for professional investors. How do we get empowered through that?

Connecting pieces of evidence to an investment hypothesis creates a narrative. How to bring the evident substance into a narrating form? Can you create a genuine story that can be plausibly conveyed to colleagues, investors and regulators? Why should we even work on telling an investment story? How to distinguish between leading versus misleading storytelling?

In this course we work with you on integrating validated quantitative and qualitative evidence into a causal sequence that supports an investment hypothesis. Narrating a story based on your sourced evidence makes data, information and knowledge easier to comprehend by your stakeholders. Understanding your investment hypothesis more comprehensively makes it easier for your colleagues to share their critical appraisal with you. It enables your investors to perform plausibility checks on your investment decisions. And it strengthens your compliance-side through "narrative reporting", an increasingly dominant regulatory requirement. An authentic story is one of the most effective leadership and strategic tools you can use. Make better investment decisions by learning how to utilize it.

SEMINAR DETAILS

LECTURER Mag. Dr. Matthias Strolz
DURATION 2 x 3h
LANGUAGES English (also available in German)
GROUP SIZE Online

LEARNING GOALS Learning Goals: Understand how to form a narrative based on causally integrated evidence that supports your investment hypothesis. Adopt a tool-kit for implementing storytelling into your investment process.

TARGET GROUPS

- Regional Banks
- Private Banks
- Foundations
- (Multi-) Family Offices Leader
- Manager
- Department (Marketing)
- Advisor
- Managment Consultant



UNCERTAINTY MANAGEMENT & EFFECTIVE NETWORKING

LEARN HOW TO ACQUIRE & KEEP CLIENTS IN UNCERTAIN TIMES WITH EFFECTIVE 'NETWORKING'

1

THE FUNDAMENTALS OF EFFECTIVE NETWORKING

INTRODUCTION

- We first introduce the concept of Networking
- Networking techniques that really work
- Obstacles to effective networking
- How to apply these techniques in real situations

09:00
-
12:00

2

HOW TO CAPTURE NEW CLIENTS WITH NETWORKING

DEFINE YOUR IDEAL TARGET CLIENT "PERSONA"

- Understand what could make them interested in your services
- Where to meet them
- How to build an initial relationship that builds overtime

09:00
-
12:00

3

ADVANCED NETWORKING TECHNIQUES

STAY ONE STEP AHEAD OF YOUR COMPETITORS IN DEVELOPING YOUR BUSINESS

- How to transform clients into life-long partners
- How to maintain and nurture relationships overtime
- How to effectively assure a constant addition of new clients
- Science based techniques to improve current clients' loyalty

09:00
-
12:00

4

SMALL GROUPS COACHING SESSION

3 GROUPS OF ONE HOUR EACH DURING WHICH PARTICIPANTS CAN :

- Address specific challenge
- Define their own networking plans
- Learn from other participants' experience

09:00
-
12:00

ONLINE-COURSE DESCRIPTION

How important is it for you to constantly add new clients to your business? You might rely mostly on your loyal ones, which could be insufficient to sustainably develop your company, especially during these times of high uncertainty.

"Networking" as the science behind developing valuable personal and professional relationships with new and existing clients, is at the very base of any professional service, including financial services. The good news is that networking is not a talent we were born with. It's a skill we can learn. It has rules and principles to be recognized and respected in order to be effective.

In this online workshop you will learn the best proven networking techniques that will help you to build meaningful relationships with new clients and keep them loyal for years. Finally you will be able to participate in high-value coaching sessions where in small groups, you can receive personalized feedback on your personal challenges and eventual obstacles you have encountered, and you want to solve. This is a unique opportunity offered by this program.

SEMINAR DETAILS

LECTURER

Luca Signoretti, MBA

DURATION

4 x 3h

LANGUAGES

English (also available in French and Italian)

GROUP SIZE

Online

LEARNING GOALS

Improve your business performances and prospective by using the most advanced networking techniques to acquire new clients and increase the loyalty of your current ones. This will keep your company one step-ahead of the competition.

TARGET GROUPS

- (Multi-) Family Offices
- Wealth Managers
- Private Banks
- Regional Banks
- Trusts
- Finance Director
- Financial Analyst
- Corporate Treasurer
- Management Consultant
- Performance Manager
- Legal & tax advisor



INVESTMENT COMMITTEE CONFIGURATION

1

09:00
12:00

WELCOME & INTRODUCTION

INTRODUCTION TO A CULTURE OF COMPLIANCE

- Principal-Agent Considerations
- Culture vs Process vs Individual
- Career Protection Objectives
- Procyclicality Concerns
- Knowing-Doing Gap in Behavioral Finance
- Investment Committees vs Comparative Advantages

BEST PRACTICES - HOW TO CONFIGURE A TEAM

HOW TO CONFIGURE AN INVESTMENT COMMITTEE

- Maximizing Cognitive Diversity for High Performance Investment Teams
- Train Decisions Under Uncertainty
- Increase Ambiguity Tolerance
- Heuristics for Creative and Critical Thinking
- Introduce Simple Rules
- Align Incentive Systems
- Examples for Best Practices

2

09:00
12:00

/ SESSION ONE

BEST PRACTICES STUDY

Participants will reflect on their own investment teams/committees and explore how to optimize it by applying previously introduced techniques and lessons learned.

AFTERNOON / SESSION TWO

REVIEW YOUR FINDINGS

Moderated by the lecturer, participant share their findings and reflect together on eventual further improvements of their own or other findings.

INTROSPECTIVE CASES:
Reflecting on your own committee

ONLINE-COURSE DESCRIPTION

“Never let a crisis go to waste.” This truism became popular again during the pandemic. The impact of an event like the current one implicitly performs a stress test on whether the decision support systems of investment committees are sufficiently advanced. In other words: how to improve the resilience of investment professionals and their related committees?

This is easier said than done. For us to change our behavior lastingly, certain conditions need to be met. Thus, personal resilience is not being built overnight and cannot be called without considering the context in which resilience is performed. This is equally true for investment professionals and their related investment committees. Staying resiliently focused on most evidence-based investment decisions enables them to master challenges, setbacks and even crises better than others. A crucial comparative advantage.

This online course introduces you and makes you test best practices based on which professional investors can build and perform resilience individually and as an investment committee.

SEMINAR DETAILS

LECTURER
DURATION
LANGUAGES
GROUP SIZE

Mag. Dr. Markus Schuller, MBA, MScFE
2 x 3h
English (also available in German)
Online

LEARNING GOALS

How to maximize cognitive diversity in investment teams
How to incentivize investment teams to share their best evidence
How to run a committee effectively. Best practices and case study included

TARGET GROUPS

- Family Offices / Multi-Family Offices
- Wealth Managers
- Private Banks
- Regional Banks
- Trusts
- Finance Director
- Financial Analyst
- Corporate Treasurer
- Management Consultant
- Performance Manager



ONLINE COURSE CERTIFICATES



 **PANTHERA SOLUTIONS**

ASSET MANAGEMENT CONSULTING

This is to certify that
BILJANA KLING

has successfully completed the
INVESTMENT COMMITTEE CONFIGURATION

An online certificate course developed
by the Panthera Solutions Sarl


The CPD Certification Service

MARKUS SCHULLER
FOUNDER & MANAGING PARTNER

05. APRIL. 2020
24 HOURS

BILJANA KLING
MANAGING PARTNER

EASY COLLABORATION

REGISTRATION	VIA PARTNER OR PANTHERA SOLUTIONS
PLATFORM	BY PANTHERA SOLUTIONS
CONTENT	BY PANTHERA SOLUTIONS
LECTURER	BY PANTHERA SOLUTIONS
CERTIFICATE	BY PANTHERA SOLUTIONS
MEDIA CARDS	BY PANTHERA SOLUTIONS
FOLLOW-UPS	BY PANTHERA SOLUTIONS
SUCCESS FEE	TBD
PRICE POINTS	ONE DAY EUR 990 TWO DAYS EUR 1690 <ul style="list-style-type: none">▪ PLUS VAT IF APPLICABLE▪ DISCOUNTS POSSIBLE FOR SELECTED GROUPS VIA COUPONS

TEAM



Mag. Dr. MBA, MScFE
MARKUS SCHULLER
FOUNDER & MANAGING PARTNER



MBA, MScCRSG
BILJANA KLING
MANAGING PARTNER



VICTORIA BARKER
HEAD OF SALES



MA, MBA
PEIXIN DALLARA
SALES / USA & GLOBAL



Prof. Dr.
GREGORY GADZINSKI
SENIOR CONSULTANT



MBA (LSE)
LUCA SIGNORETTI
SENIOR CONSULTANT



Mag. Dr.
MATTHIAS STROLZ
SENIOR CONSULTANT



Prof. Dr.
HANS MÜHLBACHER
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SHABNAM MOUSAVI
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Dr.
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