

FINANCE ASSOCIATION UC3M

(FAUC3M)



Annual Report

Academic Year

2021/2022

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FAUC3M OVERVIEW

WHO ARE WE?

The Finance Association UC3M (FAUC3M) is a student-run society based in Carlos III University (Madrid, Spain), which aims to **support its members to thrive in their future career in Finance.**

Since our foundation in 2015, we have become one of the most important Spanish student organizations in our area (finance, economics, business), creating a **powerful network of talented students and professionals.**

BOARD AND TEAM STRUCTURE

▪ BOARD



Jorge Rodríguez

President



Diego Rivera Lavid

**VP Treasury & Legal
Affairs**



Jose Antonio Guerrero

VP Events



Elena Huimiao Chen

**VP Marketing and
Communication**



Lucía García García

**VP Organizational
Development**



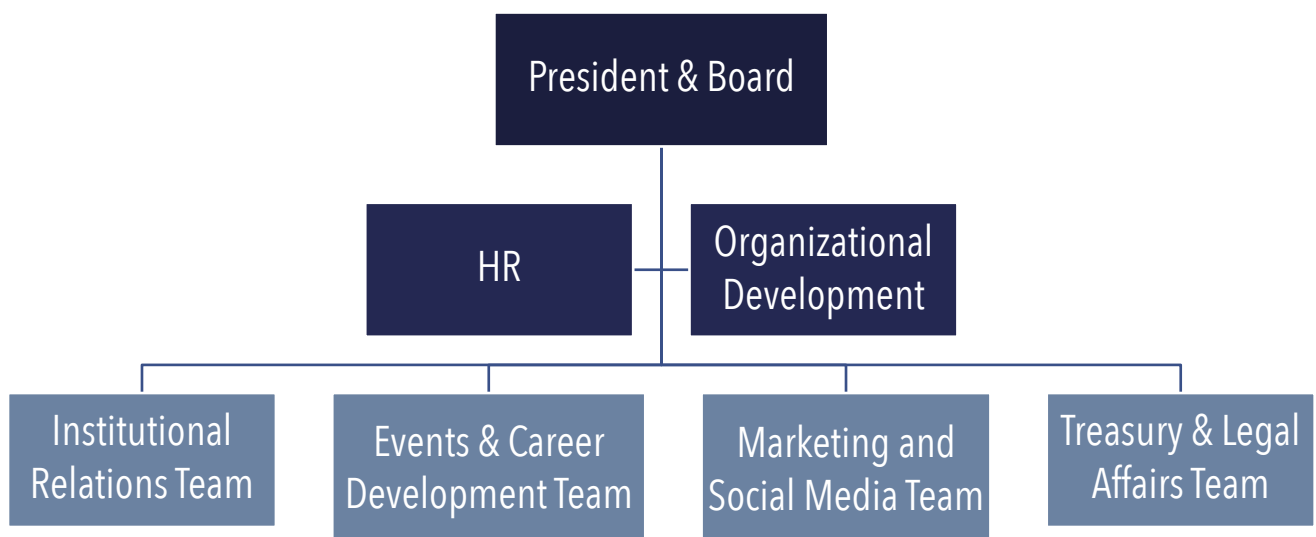
**Pepe Álvarez de las
Asturias**

Ex - President

▪ ORGANIZATIONAL CHART

Apart from the Board, FAUC3M has a TEAM of brilliant students which were chosen in a competitive recruiting process. The TEAM supports the Association in in six main areas:

- Institutional Relations
- Events & Career Development
- Treasury & Legal Affairs
- Human Resources
- Organizational Development
- Marketing & Social Media



GOALS AND MISSION

FAUC3M is focused on Finance Careers such as Investment Banking, Private Equity, Wealth and Asset Management and Trading. Therefore, we work under several goals and missions that allows the team to row in the same direction. Our main objectives are:

VALUABLE KNOWLEDGE

We mainly aim to provide **support and useful information** about the financial industry (careers, processes, exit opportunities), technical skills needed, etc.

NETWORKING

We strive to **create a powerful network** with top-tier financial institutions and firms, professionals, universities, and talented, motivated students.

JOB OPPORTUNITIES

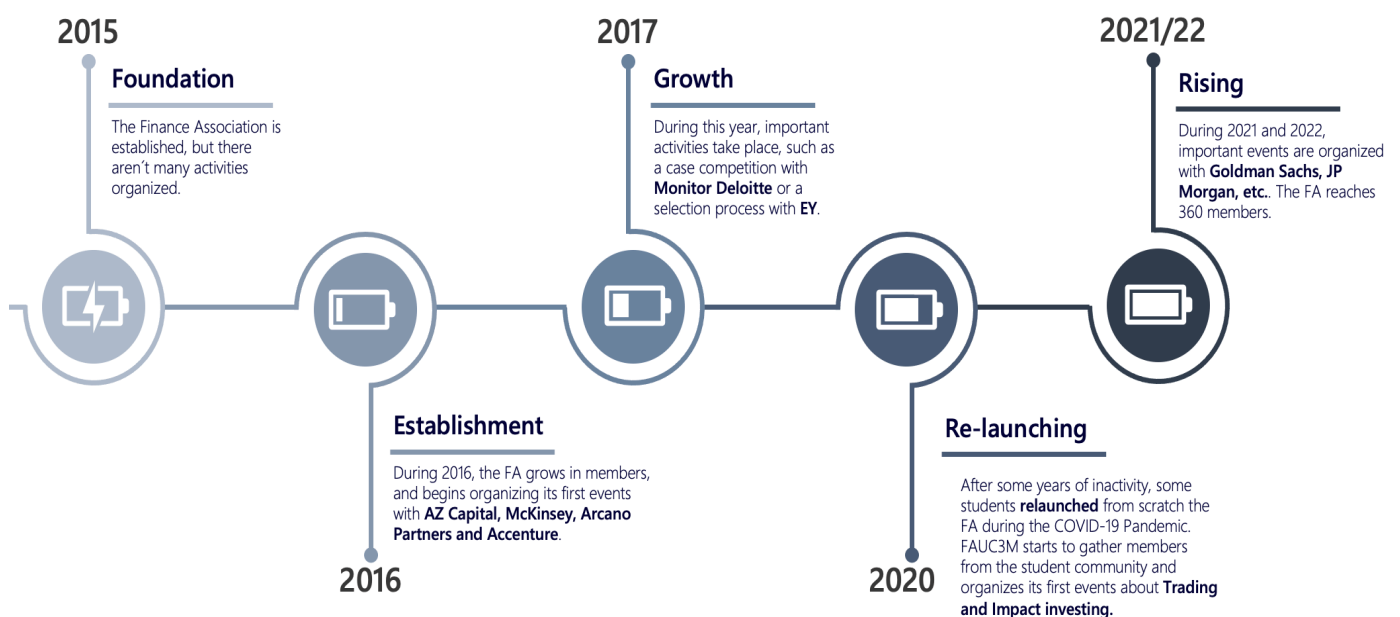
We seek to position UC3M as a **potential source of candidates** for entry-level and junior professional opportunities within finance careers.

HISTORY & GROWTH

FAUC3M was founded in 2015 in order to provide a solution to the existing need to build up a network of students interested in finance within the fold of the UC3M.

However, after a period of inactivity as a consequence of the generational change, the new Board re-launched the Association in April 2020 with new well-prepared people and fresh ideas in order to face new challenges.

• FAUC3M's timeline

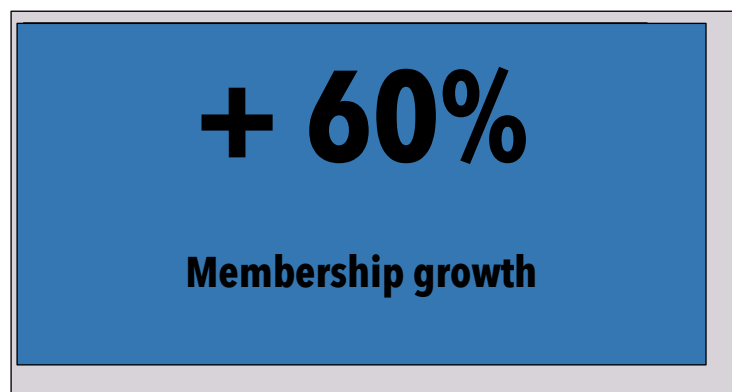


- **Membership growth**

During this academic year 2021/22, we have increased our membership growth in a substantial way

We started 2021 with 226, and we have closed with 363. This consolidates us as one of the most attractive associations for the university community and encourages us to keep working.

Students from different academic levels (both undergraduates and postgraduates) and fields (finance, management, economics, law, engineering) make up and enrich the Finance Association UC3M.

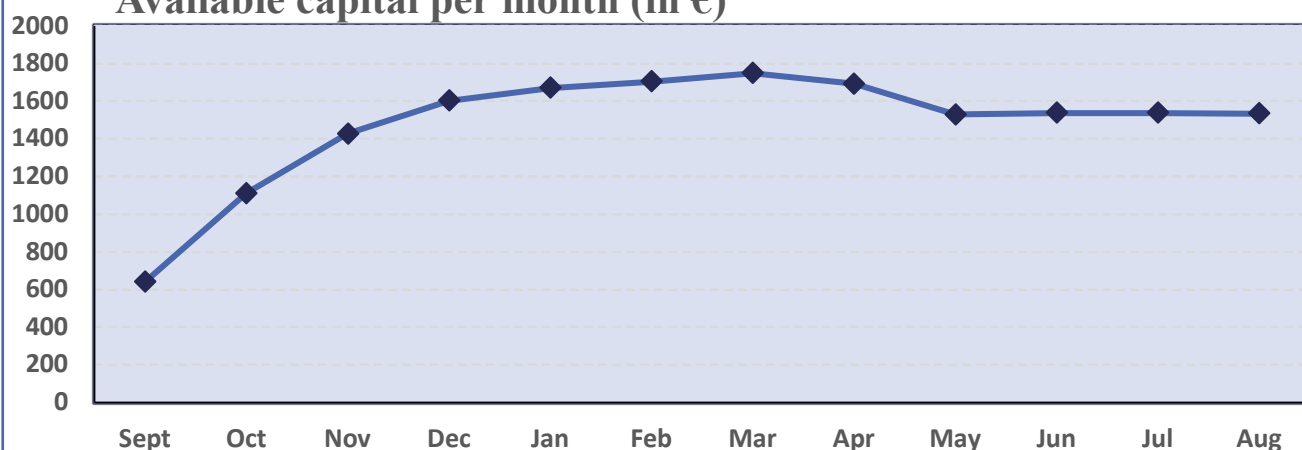


TREASURY

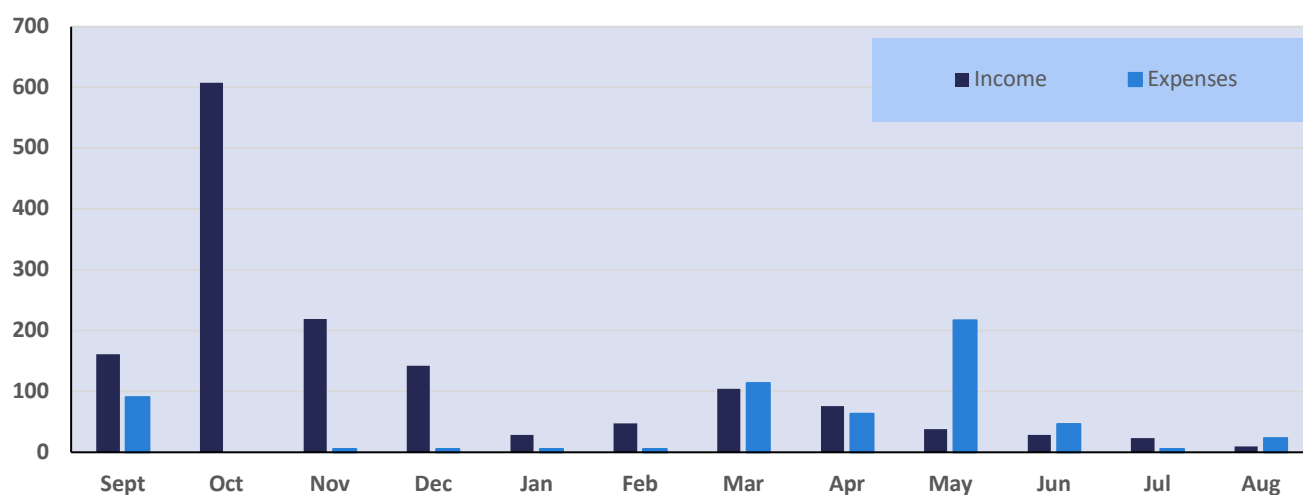
Thanks to the contributions of its members, the Finance Association UC3M has raised a significant sum of capital that it is available to reinvest in the training of our members in the following seasons. This year our training expense has been very higher than last year due to the organization of workshops and the continuation of the book collection FAUC3M

Starting the year with €1534,83,44, it closes with €1579,48.

Available capital per month (in €)



Income and expenses per month (in €)



• **Training Expenses**

The following are the most relevant programs, activities and resources we offered to our members and that we plan to keep developing for the year 2021/22:

➤ **Resource database:** We have prepared a complete resource database for our members to use. This includes:

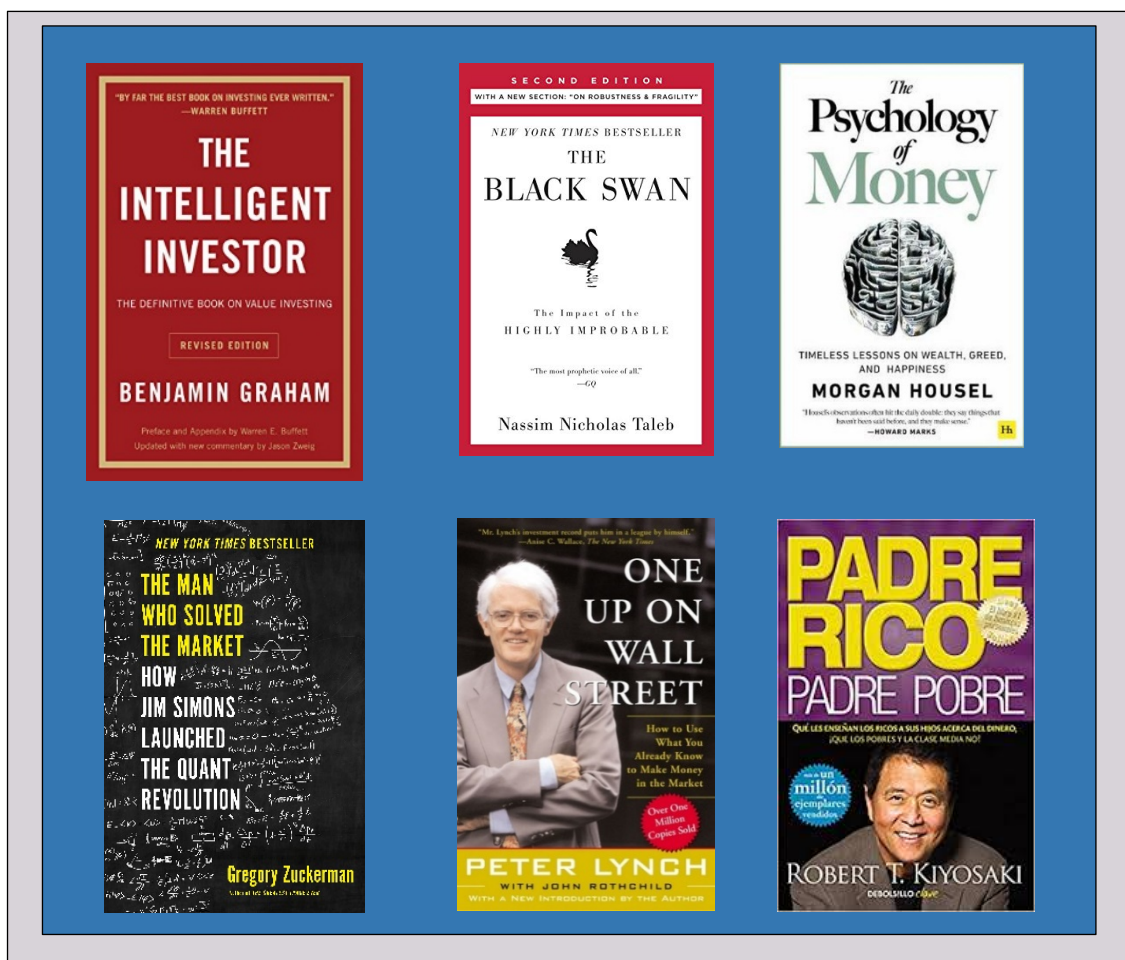
- Investment Banking Application and Technical Guides
- Specialized resources for each financial area (Hedge Funds, Private Equity, Trading, Asset Management, etc.)
- CFA, GMAT and other courses' preparation material
- Lists of financial firms and information about their selection processes and opportunities
- Courses for beginners
- Excel Models, CVs, Cover Letters templates
- Digital books and guides
- Webinars and events recordings and materials

➤ **Subscription to Wall Street Prep:** to prepare students interested in investment banking and corporate finance.

➤ **Registration in the "Investing & Trading Bootcamp":** our members

had access to sessions where trading and capital markets experts explained the main concepts, theories, and techniques necessary to obtain profitability.

- **"Book Collection FAUC3M":** during this year, we started a collection of books purchased for our members. This was a fully new initiative that has been very popular among our members. Currently, our library consists of 6 books, and we aim to expand it substantially during the upcoming year, which begins in September, thanks to the capital accumulated.



ACTIVITIES & EVENTS

WHAT DO WE DO?

In order to achieve our goals, we are committed to organize several types of activities such as:

- **Webinars & conferences:** We have invited finance professionals to come and explain us about their firm, experience, advice, etc.
- **Bootcamps:** We have organized a series of bootcamps focused on a common topic or a technique in order to boost it among our associates.
- **Case-competitions:** We have proposed challenges in which participants strive to present the best solution to a problem
- **Personal Development Workshops:** We have focused on organizing practical sessions in which attendees learn how to improve a personal feature

Some of our invited guests are:



WEBINARS & CONFERENCES

In our events, professionals from the financial world (IB, Private Equity, Trading, Asset Management) explain us a specific part of their job, their firm or a past project.

Between the beginning of FAUC3M and during the whole academic year 21/22 we have successfully organized the following webinars and conferences:

1. Discover Goldman Sachs



Pablo Villagra, analyst at Goldman Sachs in Zurich, explained our members key insights to about Goldman Sachs and its private wealth management division in Zurich.

2. Investment Banking with J.P. Morgan



Jorge Dancausa, associate at J.P. Morgan in its Investment Banking Division, showed our members how J.P. Morgan works, what are his daily duties, and explained us recent deals which J.P. had conducted.

3. Wealth Management and Private Banking with Deutsche Bank



Borja Martos, head of Wealth Management and Private Banking in Spain and Portugal, spoke to our members about the business of Wealth Management and Private Banking, the type of clients and the responsibility of leading such a division.

4. Discovering the Crypto World



Oliver Ramos, crypto analyst and enthusiast, had the honor to host the first crypto event in our association. He explained several concepts and strategies about crypto trading, as well as explaining the current outlook of the crypto scene.

5. La importancia de la asignación técnica en nuestras carteras



Javier Lorenzo, portfolio manager at GPM, very kindly stressed the importance of a tactical and rational allocation in our portfolios.

6. Private Equity with Cinven



Miguel Segura, senior principal at Cinven, explained our members the key trends in Private Equity during the recent years, and allowed us to get an overview of this specialized market in Spain.

7. Q&A with EQT group



Marcos Álvarez, Director of EQT group, was invited to show our members the professional prospects in EQT group and the world of private capital and real assets.

PAST WEBINARS AND CONFERENCES

8. Q&A with Blackstone



Alfonso Bauzá de Mirabó, senior associate at Blackstone, answered to the questions of our associates, explained us his role at Blackstone and gave us some very useful professional advice.

9. Investment Banking Q&A with UBS



Borja Sánchez, M&A Associate at UBS, and alumni from UC3M gave us wonderful insights on IB and Bulge Bracket banks, explained how UBS works and gave us some tips for selection processes.

10. BNP PARIBAS ¿What is Private Banking: wealth management?



Ana Blázquez, Head of Wealth Solutions at BNP PARIBAS gave us some insights about private banking, and more specifically Wealth Management. Our associates had the opportunity to ask questions and discover the multiple professional exits of this area.

11. Investment Banking Insights: Nomura



Roberto Sánchez García, IB associate gave us some very useful insights on IB and the industry. With experience on prestigious IBs such as Nomura, Santander and BBVA the event was a success among our associates.

12. Financial Risk Management with BBVA



In this webinar, **Pedro Agudo**, Head of Wholesale Risk Strategy at BBVA, spoke to us about Financial Risk Management (Credit Risk, Corporate, & Institutions Banking Risk), its professional exists and the scalability of this sector.

13. Meet ARCANO: Economic Research Department



Joaquín Rivera Marcos, junior economist at Arcano Partners and a brilliant former UC3M student, gave us an interesting conference where he discussed the following topics: Arcano and its structure; How is the Macro Department; The values of Arcano Partners and selection processes

14. Finance Careers: European Investment Fund



Adrián Zambrano, Senior Institutional Business Development Officer at the European Investment Fund (Luxembourg) gave us some insights on project valuation and financing through debt and equity products, as well as other structured products.

15. Is it profitable to invest in the stock market?



Mikel Tapia, president of the technical advisory committee of the IBEX 35 and **Jorge Yzaguirre**, CEO of Bolsa de Madrid (BME group) shared with us their thoughts about investing in the stock market nowadays. Special emphasis was placed on current market conditions derived from the COVID-19, investing in regulated markets, cryptocurrencies, and other technical aspects of trading.

16. Inside a Hedge Fund: Hanway Capital



Ignacio and Albert, founding partners of Hanway Capital, a hedge fund, explained us what a Hedge Fund is, what is their business about and how they make a profit in volatile market environments.

17. Wealthtech and Passive Management: Finizens



Giorgio Semenzato, CEO and cofounder of Finizens explained us the new concept of "Wealthtech firms", how passive management works and the perspectives of both for the future.

18. The Fintech Revolution: Aurora



Juan Fernández de Bobadilla, CEO and founder of Aurora App, Javier Rodríguez-Mantiñán, Business Consultant at ING and David Sánchez-Camacho, Marketing Director of Ninety Nine dazzled us with the revolutionary changes in this sector, its future,

the necessary qualities to work at a fintech, and the impact these firms are having in society.

19. Value investing: ANDBANK private bankers



Miguel de Juan, one of the most recognized value investors in Spain shared with us some ideas about Value Investing, his background and experience, and his vision for the future of this type of investment.

20. Introduction to Derivatives & Trading



Diego Morín, market analyst from IG Trading, spoke to us about derivatives and trading, CFDs, options, as well as some advice to boost a career in this sector

21. Market perspectives for 2021



Diego Morín also shared with us his analysis about market trends in 2021. He talked mainly about A macroeconomic view of 2021; How the currencies reacted; Projections for the main stock indices; Black swans that could mark the year; Commodities

22. Open Value Foundation: Impact Investing



María Ángeles León, co-founder and CEO of Open Value Foundation, introduced us to the real meaning of impact investing, as well as its multiple exit opportunities

23. Breaking into Finance



Juan Gómez Vega, CFA, Investment Director at Deutsche Finance International, and CEO of Breaking into Finance gave us some advice on how to break into a highly competitive sector as finance, as well as its exit opportunities and future prospects.


BOOTCAMPS

Bootcamps are a series of intensive sessions with a common topic. The objective is to go deep into a complex financial subject and master it through various sessions.

Between the beginning of FAUC3M and during the whole academic year 21/22 we have successfully organized the following bootcamps:

1. Investment Seminar "Benjamin Graham"

SEMINARIO DE INVERSIÓN

 BENJAMIN GRAHAM

Curso
21-22

APRENDE A ANALIZAR INVERSIONES, PREPARAR CARTERAS DE INVERSIÓN, VALORACIÓN DE EMPRESAS, ANÁLISIS DE MERCADOS, ¡Y MUCHO MÁS!

FA | FINANCE ASSOCIATION UC3M

SEMINARIO DE INVERSIÓN
BENJAMIN GRAHAM

El Seminario de Inversión Benjamin Graham, que organiza la Finance Association UC3M, pretende ser una herramienta de aprendizaje con el fin de formar a jóvenes universitarios en materias de inversión y análisis financiero.




Consistirá en **reuniones periódicas** (10 a lo largo del curso) que, aunque tendrán parte teórica, serán **mayoritariamente prácticas**, enfocadas al mundo real y con casos y escenarios pragmáticos.

Algunos de los temas que se tratarán son:

- Análisis del ciclo económico
- Valoración de activos, con valoración por múltiplos
- Inversión en oro vs inversión en moneda fiat (dólar)
- Análisis financiero de una empresa
- Análisis fundamental de empresas cotizadas
- Construcción y gestión de una cartera de inversión

SEMINARIO DE INVERSIÓN
BENJAMIN GRAHAM

Las sesiones estarán dirigidas por **Alberto Roldán**, profesor asociado de la UC3M y experto con +20 años de experiencia en el mundo de las finanzas y la inversión. Su trayectoria ha pasado por:

Muy importante

1. Las plazas son limitadas, con lo cual cuanto antes se aplique, más posibilidades de conseguir plaza.
2. Se requiere compromiso en asistencia y participación.
3. El inicio del seminario está previsto entre el 18 de noviembre y finales de mes.

¡Si te interesa, apúntate en el link de nuestra bio o escríbenos a fauc3m@gmail.com para descubrir más!

The Benjamin Graham Seminar was an initiative that aimed to give students an advanced notion of financial analysis.

The Seminar consisted of 10 sessions, held in person throughout the course and in a special classroom in the centre of Madrid. The topics that were covered included: shocks and economic cycles, fundamental analysis, asset valuation, company valuation, the effect of economic policies on investment decisions, etc.

The teacher of the course was the Professor of Economics and Finance Alberto Roldán, with +20 years of experience in the sector, standing out as Chief Investment Officer of GBS, CIO at Lloyds Banking Group and VP of strategy in the asset management division of BBVA Europe.

The seminar was financed with money of the Finance Association, and partially by the students that went to class. It was a complete success and the feedback from the students proves it.

PAST SEMINARS

2. Investing & Trading Bootcamp



From FAUC3M we decided to organize this bootcamp in which experts from trading and capital markets will explained us the main concepts, theories and techniques necessary to be able to generate profits with our money.

These experts were **Héctor Mohedano** (Senior Asset Manager at Mapfre and specialized in Derivatives and Equities trading) and **Javier Lorenzo** (Exchange and Markets expert and CEO of Jlorenzotrading).

Some of the topics discussed were monetary and risk management, Meb Faber's Trinity Portfolio, Market Timing, methods of valuation of companies, among others.

3. CFA Program: learn about the most prestigious certificate on Finance



Marta Calvário de Almeida, CFA | CEO & Co-Owner Finance Academy and **Jesús Moler Rodríguez**, Associate Director of Transactions at Barings Real Estate (and CFA Level II Candidate) explained us what the CFA program is, which are the benefits and who can qualify for it.

4. CFA masterclass: Ethics in finance



In collaboration with Finance Academy, we organised a CFA masterclass on Ethics for CFA Level 1 from the hand on Jorge Martret CFA.

Attendees received a certificate certifying their participation in the masterclass.

CASE COMPETITIONS

Case-competitions are a great opportunity to challenge our members to put in practice everything they know about a certain topic (trading, investment banking...).

This year we have organized again the Celonis competition that was organized during the 20/21 academic year, but the number of case competitions has been reduced because the association has decided to focus on top-notch events as part of its main strategy.

PAST CASE COMPETITIONS

1. Celonis: Turning Data into Value with Process Mining



Celonis introduced AI-driven process mining to our associates and its close relationship to finance.

Celonis very kindly organized a **certification program** which included self-learning and case studies for our associates. A process Mining Certificate after completion was given out to those who took part.

2. Celonis: Process Mining in finance and consulting



Process mining is responsible for optimizing the information to generate better results. It focuses on modeling, controlling and improving business processes.

Celonis, a leading company in the sector explained to FAUC3M and CAUC3M (consulting society) associates what process mining is and the multiple uses it has in finance and consulting.



3. Amplifyme: Trading simulation

Amplifyme allowed our associates to participate in a trading simulation bootcamp where we learnt how the principal Bulge Bracket banks to train their analysts.

4. Masterclass on trading with Amplifyme



The trading simulation was such a success that we organized a **masterclass** with the Amplify team on the occasion of their new ReTrader app. With this app key moments in the stock exchanges and capital markets can be relived to analyze them. Specifically, the event was focused on portfolio management and trading in times of crisis and collapse.



5. Virtual stock trading competition by FAUC3M

We created our **own** Virtual Stock Trading Competition. This was a trading competition for students in which participants had \$ 1,000,000 and had to obtain the maximum possible profitability during a 4-week period.

PERSONAL DEVELOPMENT WORKSHOPS

Personal Development Workshops are practical sessions oriented towards improving a specific topic such as CVs and Cover Letters, how to network, how to nail an interview, etc.

Some of the past workshops we've held are:

1. How to prepare for an interview: Dr. Nicolas Deuschel



Nicolas T. Deuschel, research professor, HR expert and consultant gave our associates some advice on what it takes to grow, secure and (re)-create a career in a highly competitive world of work.

2. Cómo triunfar en LinkedIn - Mejora tu perfil y networking



Javier de Mendizábal, Enterprise Relationship Manager of LinkedIn explained u show to boost our LinkedIn profiles in order to stand out and highlight your qualities when it comes to social networking.

3. VCV: Soft Skills



Ani Arevikian, Manager of VCV (a company specialized in recruiting advice) spoke to us about the importance of soft skills and personal branding on today's interviews and recruiting processes.

4. Resumé & Cover Letter for Investment Banking



One of our board members, **Gonzalo Morso**, with experience in IB and investment management organized this personal development workshop to help our associates in their resúmes and cover letters.

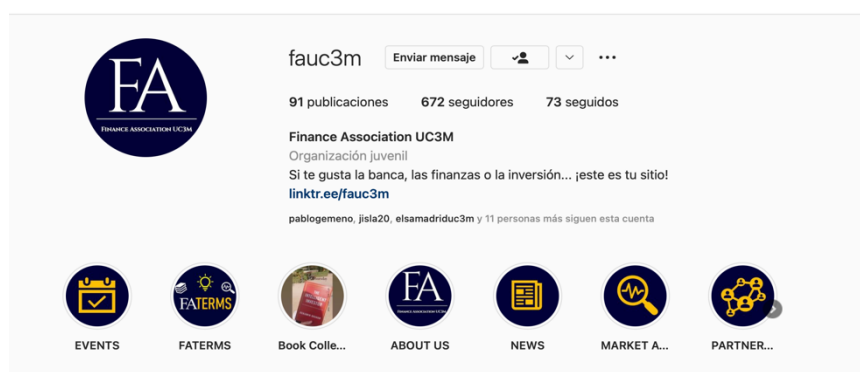
OUR NETWORK

SOCIAL NETWORKS

We have also increased our popularity on social networks, reaching more people than solely our members, and thereby widening our scope.

Check out our **website**: www.fauc3m.com, if you want to stay up to date on our activities. Here we announce and keep track of them, and we also record TEAM members, contact methods and registration forms.

 **Instagram:** @fauc3m



Besides being a key tool to promote our events and partnerships, Instagram has enabled us to easily reach potential new members. Being available in this social network has contributed to popularize our activities among young people from all over the country. All this has been possible through different initiatives:

➤ **FATERMS:**

Our 'FATERMS', published every Tuesday, consists on explaining basic concepts used in Finance. We have discovered together, along with all our followers, the meaning of concepts such as 'blue chip stocks' or "bulge bracket banks", among many others.

➤ **MARKET ANALYSIS:**

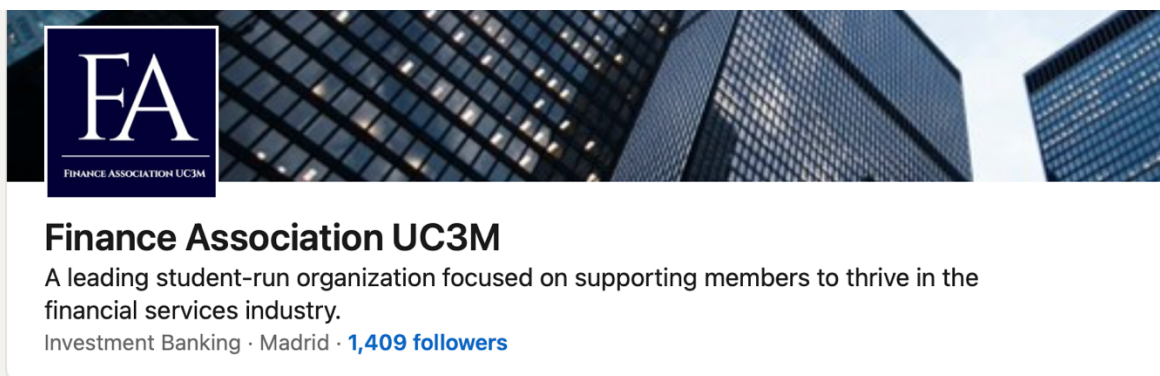
We have shared the latest events related with market fluctuations in stock values and have analyzed the reasons that have caused them. This has been a very well valued initiative by our followers, which were informed about the most up-to-date developments in this regard in a quick and understandable way.

➤ **NEWS:**

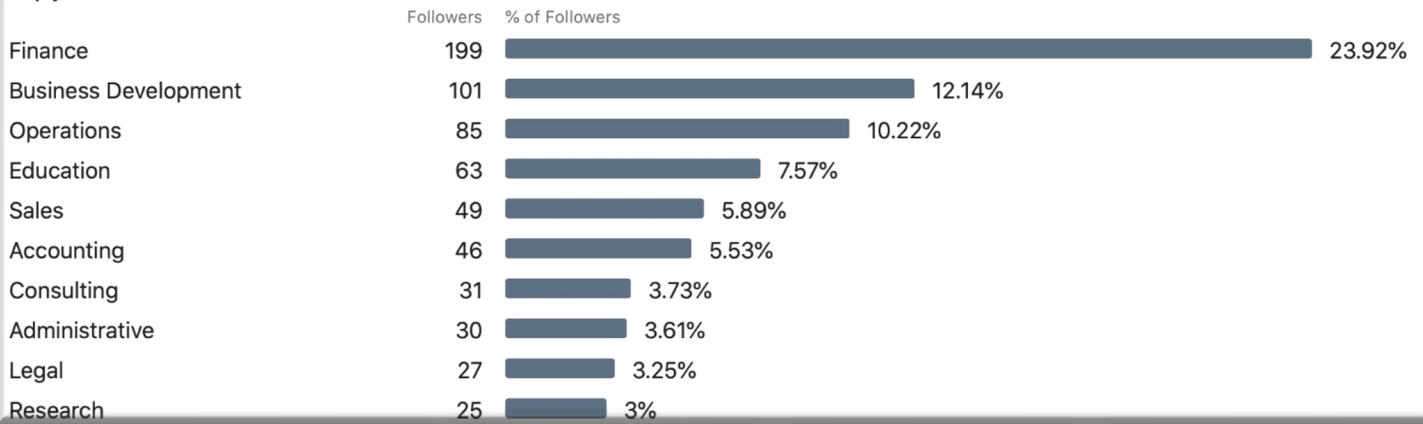
We have also published the latest and most relevant news on finance that anyone should know at that time. This initiative has indeed enabled us to emerge as constantly active and dynamic account for the university community on Instagram.

 **LinkedIn:** Finance Association UC3M

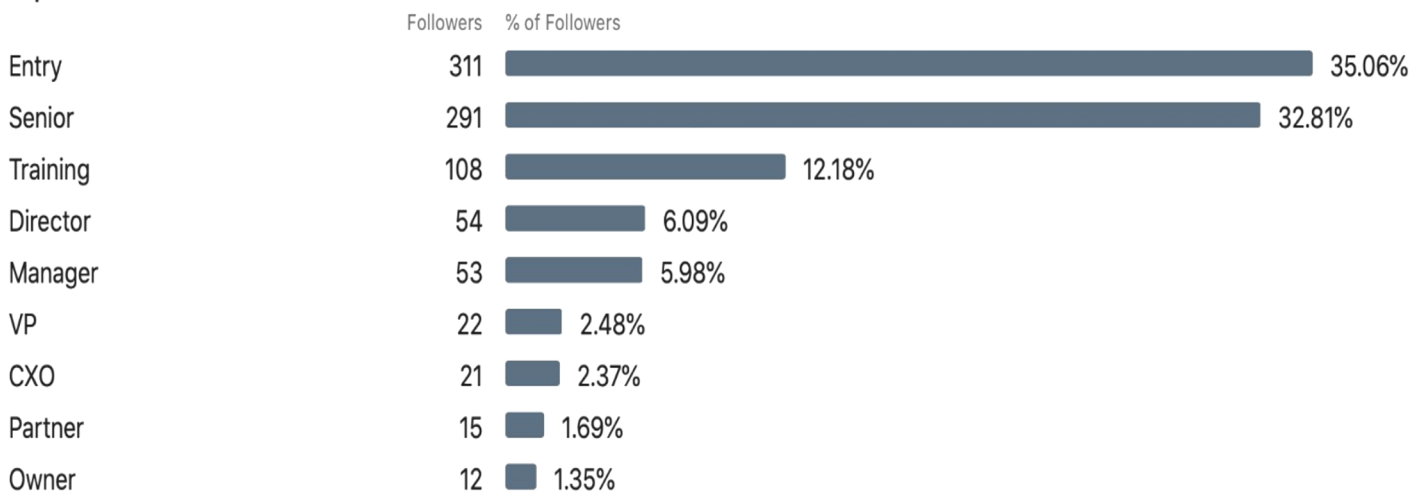
With our LinkedIn account we reach companies from different sectors, as well as workers from all job scales and diverse large cities, including foreign ones. Check out our statistics:



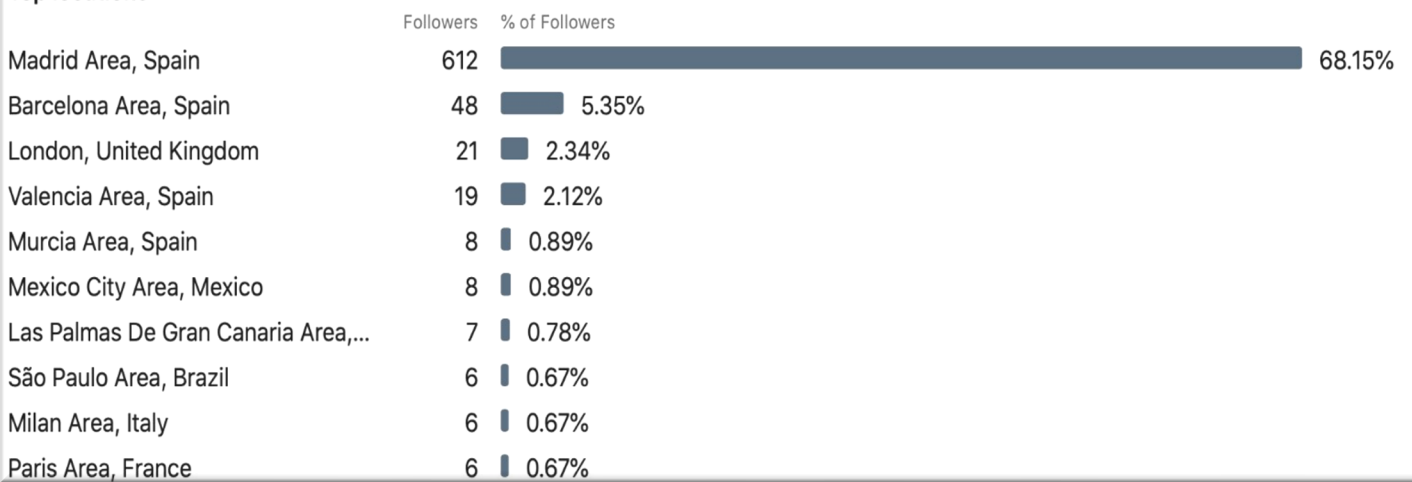
Top job functions



Top seniorities



Top locations



Furthermore, we have developed a strong network with other student societies, as well as different companies. Signed partnerships has been an achievement and we hope that during next academic year 22/23 we are able to internationalize FAUC3M even more.

Partnered companies



Partnered societies



Contact us!



@fauc3m



Finance Association UC3M



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www.fauc3m.com