

Executive Diploma in Fintech



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INTRODUCTION

The growing importance of smartphone is creating a different user experience (digital world vs physical world) and nowadays, it has become more impactful in economy and in the payment sector.

LANGUAGE MEDIUM

The course will be delivered in Cantonese, with course materials in English.

MODULES

There will be three modules, each concentrating on a key topic. Each module's duration will be five 3-hour lectures. The total contact time will be 45 hours.

DEADLINE FOR APPLICATIONS

23 February 2019

DATES AND TIME

Modules	Dates & Time	Venue
EDFT – 20001-2019-1-SS M1 New Economy, Financial Technology and Regulation	Saturday 2, 9, 16, 30 March; 6 April 2019 10:00am – 1:00pm (Please note that <u>no</u> class will be held on 23 March)	The Hong Kong Management Association 3/F South Seas Centre Tower 2 75 Mody Road Tsim Sha Tsui East KOWLOON
EDFT – 20002-2019-1-SS M2 Crypto Currencies and Blockchain	Saturday 27 April; 4, 11, 18, 25 May 2019 10:00am – 1:00pm	
EDFT – 20003-2019-1-SS M3 Digitalization and Application	Saturday 22, 29 June; 6, 13, 20 July 2019	

FEE

HKMA Member: HK\$15,000

Non-member: HK\$16,500

Group Discount: HK\$300 each (For two or more participants making payments on this course together)

SATISFACTORY COMPLETION OF A MODULE

A minimum of 4 out of 5 sessions is required for satisfactory completion of a module. Students must obtain at least 50% of the assessment result in the final project.

AWARD

A student who has satisfied all the requirements and completing all three modules will be awarded the Executive Diploma in Fintech.

ENQUIRIES

For course details: Ms Candy Ho on 2774-8554 Email: details.cdp@hkma.org.hk

General Enquiry & Enrolment: 2774-8500 or 2774-8501 Email: enrol@hkma.org.hk

Fax: 2365-1000 or visit the HKMA website: www.hkma.org.hk/pd/edft.

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CONTENTS

Module 1: New Economy, Financial Technology and Regulation

A. New Economy and The ABCDEFS

The new economy is the result of the transition from a manufacturing-based economy to a service-based economy. Recent advances in technology, such as Artificial Intelligence, Blockchain, Cloud Computing, Data (Big Data), Ecommerce, FinTech, IoT and Smart Cities, mark the start of the “new economy”.

This topic will cover the development and adoption of FinTech in different countries; how individual living and global economy will be impacted through using financial technology; and how technology is applied in investment and macroeconomic perspectives.

B. FinTech and TechFin

The rise of FinTech continues to revitalize financial services customers, while TechFin is increasingly looking to collaborate with the traditional financial services firms.

This topic will examine how Fintech is transforming the financial services customers’ journey through better customer centricity and by the use of emerging technologies; and the future role of FinTech in financial services and regulation.

C. Cyber Security

An overwhelming majority of the world’s largest banks and financial institutions have cited cyber security as the greatest threat to financial innovation, and hence financial institutions need to look at new forms of technology and solutions if they are to escape from the chains of their legacy IT systems and adopt innovative technology solutions.

This topic will cover the challenge of how to use technology to protect privacy and secure data in disrupting traditional financial channels, while adopting different levels of security measures in the digital fine-tuned platforms.

D. Artificial Intelligence and Finance

Because the concept of “artificial intelligence” is very broad and because its application to finance is recent, financial institutions often struggle with how to structure their innovation approach to machine learning and change their financial services.

This topic will cover the use of AI for real-world applications, including in financial business contexts and those where intelligent algorithms are implemented.

E. Regulations for Fintech

The financial services industry across the world is highly regulated irrespective of the economy/ market. While FinTech industry may be disrupting the financial services industry, it still needs to abide by existing industry regulations and work with existing regulatory bodies to bring new product ideas to the market.

This topic will cover:

1. various regulations relevant for specific major FinTech sectors;
2. rationales behind the regulations;
3. high level differences between similar regulations from different regulatory bodies (e.g. China vs HK); &
4. trends and potential changes in regulatory environment, and reasons for change.

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Module 2: Crypto Currencies and Blockchain

A. Crypto Currencies and Investment

The main reason for this sudden new interest has been the spike in the costs of Bitcoin along with other cryptocurrencies. Obviously, people are fascinated with this entirely-digital currency platform and have been thinking about how to make money out of it.

This topic will explain what crypto currencies, crypto asset, and token asset classification are, and how to invest in cryptocurrencies and the process of investing in cryptocurrencies.

B. Blockchain Ecosystem

No single company can unlock the potential of blockchain on its own. Blockchain ecosystem provides companies building on the IBM Blockchain Platform with a range of opportunities to access valuable new channels, exclusive strategic partnerships and innovative technology and resources to accelerate growth.

Understanding how each of these stakeholders fits into a blockchain ecosystem will not only give you a better appreciation of how a blockchain works, but also allow you to better evaluate its potential for growth.

C. Blockchain Technology

Blockchain represents a way to transfer value securely and with no central authority involved. Blockchain technology is disrupting the world in a way that we have never seen since the introduction of the world wide web.

This topic will cover relevant historical events, blockchain technology, infrastructure layer, latest protocol and trends of development, and will compare different platforms in the blockchain industry and project development deployment roadmap.

D. Blockchain Application

The global blockchain market is anticipated to grow as more companies adopt distributed ledger technology and mass-use cases appear. Very much still in the infancy stage, blockchain technology is currently being explored and adopted by global industry titans. Additionally, thousands of innovative companies around the world are trying to solve market inefficiencies by leveraging the benefits that blockchain technology provides to build decentralized data marketplace.

This topic will cover companies' application in the blockchain industry, from content creation and consumer to financial services; the up-to-date terminology and development of best used cases; application and tokenization process in the use of blockchain; who the players are; and why blockchain is so important.

E. ICO vs Crowdfunding

Initial Coin Offering (ICO) will have a huge impact upon its success. Get the ICO marketing strategy right, and then your business will raise the necessary funds and sustain long-term success after the initial offering.

What are the basic mechanics of crowdfunding, and the anatomy from ICO to crowdfunding portal? How is the industry landscape covering trends in the existing business model? When is good for investment data? And who are the industry key players?

This topic will cover the difference between ICO, IPO and Crowdfunding in fund raising; the basics of ICO roadmap; effective whitepaper communication; token sales; pre-launching and implementing of different ICO and crowdfunding campaigns.

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Module 3: Digitalization and Application

A. Robo-Advisors

What are Robo-Advisors? Why does it matter? How does automated investment advice platform work?

This topic will cover the evolving Personal Finance Management (PFM) landscape and its potential about automated investment advice.

B. Algo Trading

Algorithmic trading is an important factor in today's markets. Just like electronic terminals replacing open outcry, algorithms are replacing humans operating electronic trading terminals in various forms of trade execution. Algorithms can process millions of pieces of data per second, make sub-millisecond decisions, and take autonomous actions.

This topic will introduce the use of technology, the impact of algorithmic, the use of compliance algorithms to monitor trading algorithms with a view to detecting unusual behaviors.

C. InsurTech

What is InsurTech? What are the factors supporting the emergence of the InsurTech sector? What are the regulatory implications for InsurTech? What are the Business model and key commercial drivers?

This topic will cover the evolving InsurTech landscape and the potential of the emerging InsurTech industry.

D. P2P Lending, Payments and Transfers

How payments have evolved? Who are the key stakeholders and what is the payment value chain? How money is made in payments and by whom – the economic models and key commercial drivers?

Peer-to-peer (P2P) lending is an alternative lending platform that allows individuals to borrow from other individuals/ pools of individuals without going through a financial institution.

This topic will cover key terminology used within the industry and understanding of the role, value and risks of payments to all stakeholders involved in the payment transaction chain.

This topic will also cover areas related to alternative lending, including: a) introduction to alternative lending; b) why P2P lending matters – market size and disruption potential; c) how it works anatomy of a P2P portal; d) key players; and e) where this sector is headed in the coming years.

E. Digital Bank

Traditional Banks must contend with multiple challenges tied to regulations, legacy systems, disruptive models and technologies, new competitors, and a restive customer base while pursuing new strategies for sustainable growth. Fintech continues to lead innovation in the banking industry by sharpening their focus on customer experience.

This topic will cover how banks face a number of challenges; what the best choices will be; how to measure the effectiveness and pervasiveness on digital transformation efforts; and how to develop a methodology for measuring the financial value created by digitalization.

LECTURER

Dr Frederick Wong

Dr Wong has been involved in the financial and investment aspects of global market and funds research, investment strategies, wealth management solution, effective asset allocation, risk management and disciplined investment activities for growth opportunities. He has taught research-based topics about global, emerging markets and commodities markets with strength in niche financial economic and technical analysis. The lecturer is interested in exploring new investment decision and investment behavior with students. Dr Wong has also conducted courses on a variety of business subjects such as Leadership, IT Management and Investment Portfolio Management. Being an instructor in different fields of industries, the lecturer is an expert in information-knowledge and management solution. He has gained extensive teaching experience as a trainer and engaged himself in part-time teaching at the HKMA and in-house training for various financial services companies for over 10 years. Dr Wong is most willing to share his valuable experience with the participants so that they may come up with practical solutions for actual daily work problems.

Guest speakers will be invited to share their valuable experience in fintech with participants.

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Enrolment Form

Executive Diploma in Fintech

EDFT-20001-2019-1-SS

EDFT-20002-2019-1-SS

EDFT-20003-2019-1-SS

2 March - 20 July 2019

EDFT-22732-2019-1-SS

FEE: HKMA Member: HK\$15,000 / Non-member: HK\$16,500

Group Discount: HK\$300 each (For two or more participants making payments on this course together)

* Applicants should include their HKID card number and fill in all details in block letters, otherwise no MDCU will be given.
The Association will issue certificates based on the details and name format as given in this form.

Name (Mr/Ms): _____
(Surname) (Other Names)

HKID Card No.: _____ HKMA Membership No.: _____

Position: _____

Company: _____

Address of Company: _____

Telephone No. (Office): _____ (Residence): _____ (Mobile): _____

Education Level: _____ E-mail: _____

Correspondence Address: _____

Cheque Number: _____ Cheque Amount: HK\$ _____

Name and Title of Nominator (Mr/Ms): _____

Nominator Email / Address: _____

Sponsorship Company-sponsored Self-sponsored

From where did you FIRST learn about this Programme?

HKMA Email Mail Newspaper/Magazine (please specify): _____

Email Promotion from Other Websites (please specify): _____ Online Advertisement (please specify): _____

Search Engine (please specify): _____ Social Media (please specify): _____

HKMA Website (Where did you find this information): _____

MTR Station (please specify): _____ Exhibiton: Jobmarket Career & Education (EJEX) Others (please specify): _____

■ This form together with a crossed cheque payable to The Hong Kong Management Association should be returned to:
Executive Director, The Hong Kong Management Association, 16/F Tower B Southmark, 11 Yip Hing Street, Wong Chuk Hang, Hong Kong.

- Registration must be made on the Enrolment Form provided and returned to the Association before the programme commencement date (Not less than 5 days) with full fee.
- Acceptance is subject to the discretion of the Association.
- Applicants will be notified by telephone to confirm receipt of the application form and full programme fee. An official receipt will be sent to you within two weeks.
- Applicants are expected to attend the course at the place and time specified in the brochure unless otherwise notified.
- When a programme is over-subscribed, additional classes may be started in some cases. Applicants may then be notified of the new time, dates and place of meetings when necessary.
- For **ENROLMENT** and **ENQUIRIES** please call **2774-8501** (Customer Service Department) during normal office hours or Email: enrol@hkma.org.hk or fax **2365-1000**.
- No refund will be made after payment, but participants can arrange to have their places substituted should they be unable to attend the programme by notifying the Association at least 2 days prior to programme commencement.
- Fax reservations are welcome but are subject to confirmation by payment in full within 10 days of the date the reservation is made or 5 days prior to programme commencement, whichever is sooner.
- Applications, upon full payment, will be processed on a first-come first-served basis.
- When Typhoon Signal No.8 or above is in force during classes/examinations, all classes and examinations will be dismissed immediately. Replacement classes and remedial examinations will be arranged. When Black Rainstorm Warning is in force during classes/examinations, all classes and examinations will be held as scheduled.
- The HKMA reserves the right to make alterations regarding the details. For course details, please contact Customer Services Department on 2774-8501. Website: www.hkma.org.hk
- The HKMA supports the equal opportunities policy, without discriminating against any person on the grounds of gender, disability, family status or any other basis.

Personal Data Collection Statement

- The personal data of applicants are collected and kept for purposes of processing of applications of course enrolment, course admission, student and member administration, course research and statistical matters.
- The personal data provided in this form will be used by the Association for direct marketing, including special offers, training and education programmes, awards and competitions, membership, alumni, promotional activities and other services and activities that it may arrange.
- Applicants wishing for access to and/or correction of personal data may send their written requests to the Association.

If you do not wish to receive information as stated in point 2 of this statement, please indicate your objection by ticking the box. You may at any time send your written requests to the Association.

Applicant's Declaration

1. I declare that the information provided in this form and the attached documents is correct and complete. I authorize the Association to obtain information about my public examination results and records of studies from concerned institutions (if necessary).
2. I understand that the information provided in this form and the attached documents will be used in the admission assessment process and that any misrepresentation, omission or misleading information given may disqualify my application for admission and enrolment in the programme.
3. I have noted, understood and agreed to the contents of the Personal Data Collection Statement.

Notes

1. I understand that all handout materials obtained in class are strictly for my own educational purposes.
2. I have understood all the "Notes for Application" listed in Application Form.

Applicant's Signature: _____ Date: _____