

*Scientia potentia est - Knowledge is power.*

*Thomas Hobbes, Mathematician and Philosopher, 1685.*

Life-long learning is key to success in today's business world. Therefore, learning should not end with a university degree. We at PECUNDUS believe that continuous learning is the foundation of a successful professional career – especially in the world of Finance.

The name PECUNDUS stems for the latin words "pecunia" and "ludus". "Pecunia" means money and "ludus" means "school". Therefore, PECUNDUS means "money school", a place to learn about investment management.



*Dr. Marcus Schulmerich,  
Founder & Trainer*

#### **The company**

PECUNDUS GmbH ([www.pecundus.com](http://www.pecundus.com)) is a Munich-based based company to provide training services to industry professionals. It is specialized in conducting on and off-site training workshops on Finance-related topics. The company was founded in 2012 by Dr. Marcus Schulmerich who is the Managing Director of PECUNDUS and Senior Trainer.

#### **The founder**

Dr. Marcus Schulmerich, CFA, FRM has 15 years of experience in the asset management industry. His professional experience covers positions in asset and risk management at Commerzbank, PIMCO and State Street Global Advisors (SSgA). He is Global Portfolio Strategist at SSgA in Europe, Middle East and Africa (EMEA) for active quant equity strategies, passive equity strategies and smart beta equity strategies with extensive experience in the hedge fund industry.

Dr. Schulmerich holds a Doctoral Degree in Quantitative Finance from the EBS University in Wiesbaden/Germany, an MBA from the M.I.T. Sloan School of Management in Cambridge, MA/USA and an M.Sc. and B.Sc. in Mathematics from the University of Mainz/Germany. He is a frequent speaker at conferences and publishes regularly.

Since 2005 he is a guest lecturer for Asset Management, Risk Management and Financial Engineering at EBS University. For SSgA he also structures and regularly provides trainings for key clients like Sovereign Wealth Funds and Central Banks worldwide, especially in the EMEA region.

#### **The PECUNDUS workshop style**

PECUNDUS trainings are interactive workshop in small groups and offer the participants lots of opportunity to immediately apply the learned concepts in case studies and in-class exercises. This combination of application and lecture style presentation is key for a successful learning experience which is enriched by real-life examples.

PECUNDUS also offers customized on-site workshops for companies worldwide with trainings designed to suit the client's individual needs. An overview of the currently covered workshop topics can be found on the [backpage](#).

#### **Who for?**

Depending on the concrete topic, PECUNDUS workshops are designed for junior and middle level professionals working in finance, accounting, asset management and risk management. These workshops would also be useful in the preparation for professional degrees like CFA®, FRM®, CAIA® and CIPM®.

#### **References**

- EY, EMEA (Dubai, Abu Dhabi, Bahrain, and Jeddah)
- BIBF, Bahrain
- SEDCO Capital, Jeddah
- EBS Business School, Wiesbaden/Germany
- University of Applied Sciences Munich
- State Street Global Advisors (SSgA)

### Workshop topics

PECUNDUS offers the following topics as workshops of various days in length. Detailed agendas can be found at [www.pecundus.com](http://www.pecundus.com).

#### Risk Management

- Basic Introduction to Risk Management
- Downside Risk Management
- Value at Risk (VaR)
- Market Risk Management
- Credit Risk Management

#### Performance Measurement

- The Practice of Performance Measurement
- Performance Attribution for Equity Portfolios
- Performance Attribution for Bond Portfolios

#### Understanding Derivatives

- Basic Introduction to Forwards and Futures
- Basic Introduction to Options and Swaps
- Basic Introduction to Exotic Options
- Basic Introduction to Credit Derivatives
- Option Pricing Trees and Their Application
- The Black-Scholes Option Pricing Formula

#### Portfolio Management

- Basic Introduction to Portfolio Management
- Behavioral Finance – The Psychology of Investing
- Fixed Income Portfolio Management
- Equity Portfolio Management
- Strategic and Tactical Asset Allocation
- Alternative Investments
- Introduction to Real Estate Portfolio Management

#### Quantitative Methods for Financial Markets

- Mathematics for Financial Markets
- Statistics for Financial Markets
- Regression Analysis for Financial Markets
- Financial Econometrics
- Financial Engineering

#### General Finance

- Financial Desasters – Lessons Learned

#### Disclaimer

The contents of this flyer and/or descriptions are for general information purposes only and are not intended as an individual recommendation or personal investment advice. All information, descriptions and calculations in the flyer were compiled with the utmost care and checked for accuracy. However, no liability can be accepted for the correctness, completeness and currentness of the information.