

COURSE OF STUDY: Business Strategies and Management

ACADEMIC YEAR: 2023/2024

ACADEMIC SUBJECT: Banking Strategy and Management

General information	
Year of the course	First year of the Course
Academic calendar (starting and ending date)	Second semester – From 19 February 2024 to 31 May 2024
Credits (CFU/ETCS):	8 CFU
SSD	Economics of Financial Intermediaries – Secs-P/11
Language	Italian
Mode of attendance	Attendance of the course is optional but recommended

Professor/ Lecturer	
Name and Surname	Prof. Vincenzo Pacelli
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Department and address	Sede di Economia - Via Lago Maggiore, Taranto
Virtual room	Microsoft Teams page of the courses of Economics of Financial Intermediaries and Banking Strategy and Management (MT Code: cf3on11)
Office Hours (and modalities: e.g., by appointment, on line, etc.)	The tutoring can be held both physically at the office of Prof. Pacelli in via Lago Maggiore in Taranto and electronically (online) through the Teams page (MT Code: cf3on11), agreeing on the date and timetable via email with the teacher. During the course period, the tutoring is also held on Tuesdays and Wednesdays at 11.00 in the teacher's office.

Work schedule			
Hours			
Total	Lectures	Hands-on (laboratory, workshops, working groups, seminars, field trips)	Out-of-class study hours/ Self-study hours
200	64	Laboratory, workshop and seminars during the course.	136
CFU/ETCS			
8	8		

Learning Objectives	The Course intends to provide the knowledge useful for understanding how strategies are formed and implemented in the banking sector, with an analytical study of banking and financial management techniques. The Course therefore aims to provide the theoretical foundations necessary for a complete understanding of the strategic and managerial dynamics of a bank and also aims to practically explore, through business cases and project work, the various issues relating to the management of a bank.
Course prerequisites	The course requires basic knowledge of Economics of Financial Intermediaries. No explicit propaedeutic (as prescribed by the didactic rule book).

Teaching strategies	The course is delivered through lectures, practical exercises, seminars and project work.
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Expected learning outcomes in terms of	
Knowledge and understanding on:	The course aims to provide the basis for understanding the role and functioning of banks, with a particular attention on strategies and management techniques of banks. At the end of the course, the student must have acquired: <i>a)</i> adequate economic and financial language; <i>b)</i> understanding and ability to illustrate the ways in which banks collect and use financial resources; <i>c)</i> capacity for critical evaluation of strategies and management techniques of banks. Through this knowledge, the student will be able to understand all the dynamics taking place in banking.
Applying knowledge and understanding on:	The Course aims to provide all the analytical and conceptual tools for understanding the functioning of banks. The student must be able to apply the basics to real contexts and specific cases, to support personal arguments, to identify the most appropriate solutions, and to develop adequate theoretical abstraction skills.
Soft skills	<ul style="list-style-type: none"> • <i>Making informed judgments and choices</i> The course aims to encourage the reflection on banking strategies and management at national and international level through the analysis of case studies. The aim is to provide the tools that allow a critical view of the main economic-financial phenomena which influence banking management and an adequate critical and interpretative capacity. • <i>Communicating knowledge and understanding</i> The course is designed for specialist degree student who have the basics of economics of financial intermediaries and aims to provide the student with a terminology of current use in the financial markets. At the end of the course, the student will have to demonstrate the ability to apply the terminology appropriately. • <i>Capacities to continue learning</i> At the end of the course, the student must have the learning skills necessary to obtain an employment on economic, financial and banking sector, or to undertake further studies, in these sectors, with a high degree of autonomy.
Syllabus	
Content knowledge	<p>PART I Banking Banking strategies The value chain in banks The organization of banking activities Organizational macrostructure and microstructure in banks The different organizational models in banks Strategic planning in banks</p> <p>PART II The bank's production and distribution processes Transactional e Relationship banking Marketing in banks Credit and finance areas in banks Internal audit in banks Risk management in banks Retail, corporate and private banking</p>

	Banking in the financial markets Asset allocation and asset management Portfolio optimization
Texts and readings	Mottura P., Banche. Strategie, organizzazione e concentrazioni, Egea, Milano (ultima edizione); and Gandolfi G. (a cura di), Scelta e gestione degli investimenti finanziari, Bancaria editrice, Roma (ultima edizione) (capitoli 1, 2, 3, 6, 8) Or in alternative (only for Erasmus students): De Laurentis G. (Editor), Strategy and Organization of Corporate Banking, Springer. Any additional materials will be indicated during the course.
Notes, additional materials	Any additional materials will be indicated during the course. Students attending the course will be provided in advance by email (before each single lesson) with the teaching material useful for understanding the topics covered in class.
Repository	Students attending the course will be provided in advance by email (before each single lesson) with the teaching material useful for understanding the topics covered in class. The teaching material will also be available in the Teams class of the Course for three years after the end of the Course and, for the same period of time, at the request of individual students it will be made available by the teacher.

Assessment	
Assessment methods	Final evaluation by oral examination. Workshops and exercises could be scheduled during the Course which will be evaluated by the teacher and may contribute to the final evaluation.
Assessment criteria	<ul style="list-style-type: none"> • <i>Knowledge and understanding</i> The student will be able to describe and understand banking strategies and management techniques by using an adequate economic-financial language. The student will be able to understand all the dynamics taking place in banking systems, both nationally and internationally. • <i>Applying knowledge and understanding</i> The student must be able to: a) apply the basics to real contexts and specific cases; b) interpret concrete problems concerning banking, also proposing possible solutions. • <i>Autonomy of judgment</i> The aim of the course is to acquire and consolidate its own autonomy of judgment regarding the banking strategies and management techniques. • <i>Communicating knowledge and understanding</i> The student will have to demonstrate that he is able to apply terminology appropriately and pertinently. • <i>Communication skills</i> The student will have to demonstrate that he is able to apply terminology appropriately and pertinently.

	<ul style="list-style-type: none"> • <i>Capacities to continue learning</i> <p>At the end of the course, the student must have the learning skills necessary to obtain an employment in the economic, financial and banking fields, or to continue and deepen his studies, in these sectors, with a high degree of autonomy.</p>
Final exam and grading criteria	Verification of learning takes place through an oral exam aimed at verifying the learning of the course contents. The final grade is awarded out of thirty. The exam is passed when the grade is greater than or equal to 18. Workshops and exercises could be scheduled during the Course which will be evaluated by the teacher and may contribute to the final evaluation.
Further information	