

Sustainable Investing B24: Introduction to Strategies and Tactics

Credit weighting:	2.0 ECTS credits
Teaching period(s):	21 July 2025 – 25 July 2025
Level:	Bachelor
Teaching methods:	This course represents 53 hours of workload (including lectures, workshops, assignments, project work and company visit).
Course leader:	Frans Boumans, CPE
Lecturer(s):	Frans Boumans, CPE

Description

This course can be done as a standalone course in Sustainable Investing: Introduction to Strategies and Tactics and can also be combined with the more advanced course [Sustainable Investing: ESG Investment Strategy Making](#).

This one-week programme explores this rising industry and gives you the skills to navigate the terminology, activity, drivers and participants of the ESG ecosystem. This programme prepares you to harness ESG data to drive financial performance and investment strategies.

This Investments course provides a foundational exploration of investment vehicles, market structures, risk management and investment strategies. Students will learn about various asset classes, including stocks, bonds, mutual funds, real estate, and alternative investments such as commodities, hedge funds, private equity, direct lending, and cryptocurrencies. Through a combination of concepts and practical applications, the course will include key topics such as portfolio management, asset allocation, market efficiency, and behavioral finance.

What makes the course special is the hands-on approach, use of actual and relevant cases, and the focus on new developments in AI, Fintech and behavioral finance. A logical follow up course is the five-day course [Sustainable Investing: ESG Investment Strategy Making](#). Besides

this course is a logical follow-up of the course [Introduction to Finance and Banking](#) for those interested in advancing in this field.

This course will focus on the following topics:

- Definition of investing and its significance in financial markets.
- History of investing. role of investors.
- Future of investing: role of AI
- Investment strategies and tactics: Fundamental versus Technical analysis.

- Sources of data and analysis methods. The development of risk, indices and ratings.
- Asset classes: fixed income, common stocks, real estate, direct lending, commodities, FX, derivatives (futures, options), alternatives
- Stock valuation techniques
- Basics of portfolio management: risk versus return, pension funds management, mutual funds, performance measurement,
- Basics of behavioralism: overconfidence, overoptimism, FOMO, loss aversion, prospect theory, herding behaviour and other biases.
- Specialities: impact investing, mutual funds and ETFs, Green bonds, Sustainability linked bonds, social impact bonds and direct investments in companies or projects.
- Investments and asset management in transition

Target audience

The program is intended for students in banking, asset management, accounting and finance of advanced bachelor or at master level, and for those interested in becoming investment professionals, finance advisors, consultants, and business and non-profit leaders. This course is open to students.

If you have no or a limited background in finance or banking, we advise you to first take part in the five-day course [‘Introduction to Finance and Banking’](#) and then take this course as a follow-on.

A good command of English is necessary! Given the interactive nature of teaching, students must have the capabilities to actively contribute in class and communicate (understand and speak) in English well, ideally min level B2.

Aim of the course

- This course aims to equip students with a comprehensive understanding of the fundamental principles of investing, enabling them to make informed financial decisions in personal pension plans and professional contexts, like as assetmanager of a pensionfund.
- By the end of the course, students will be able to:
- Understand the role of investments in personal finance and the economy.
- Analyze different types of investment products, including traditional and alternative investments, and their characteristics.
- Develop a basic investment strategy that incorporates a diverse range of asset classes aligned with financial goals.
- Evaluate the performance of investments using various metrics and benchmarks.
- Recognize the impact of market trends and economic indicators on investment decisions, particularly regarding alternative assets.
- This course is ideal for anyone looking to build a strong foundation in investment principles, whether for personal enrichment or as a stepping stone to advanced financial studies.

Study load

This course represents 53 hours of workload (including lectures, workshops, assignments, project work and company visits).

Please note: You must attend all learning activities (e.g. workshops, fieldwork) to be able to receive the Certificate of Participation and/or the credits for this course, unless absence is officially approved by the teachers and the coordinator of the Utrecht Summer School.

Course calendar

The day to day programme is subject to changes depending on the availability of the guest lecturers.

Saturday and Sunday 19 and 20 July 2025		
Time	Activity	Description
12:00-18:00	Key pick up	You will find the exact key pick up location in the pre-departure information, which becomes available after you have paid the course fee.

DAY 1: Monday 21 July 2025		
Time	Activity	Description **

9:00-09:30	Welcome and Campus tour	
09:30-13:00	Meet & greet The Investment environment and securities markets	Definition of investing and its significance in financial markets. History of investing. role of investors. Future of investing: role of AI Investment strategies and tactics: Fundamental versus Technical analysis. Sources of data and analysis methods. The development of risk, indices and ratings. Asset classes: fixed income, common stocks, real estate, direct lending, commodities, FX, derivatives (futures, options), alternatives Stock valuation techniques
13:00-14:00	Lunch*	
14:00-15:30	Start of the group assignment	Workshop on brainstorm and valuation techniques. Brokers reports.
15.30	wrap up/summary	Summary of the day, feedback from and to the groups, outlook for tomorrow

DAY 2: Tuesday 22 July 2025		
Time	Activity	Description
9:00-12:30	Introduction to risks and returns, portfolio management and specialties	Basics of portfolio management: risk versus return, pension funds management, mutual funds, performance measurement, Basics of behavioralism: overconfidence, overoptimism, FOMO, loss aversion, prospect theory, herding behaviour and other biases. Specialities: impact investing, mutual funds and ETFs, Green bonds, Sustainability linked bonds, social impact bonds and direct investments in companies or projects.
12:30-13:30	Lunch*	
13:30-15:30	Cases	Examples in excel
15:30	Wrap up/summary	Summary of the day, feedback from and to the groups, outlook for tomorrow

DAY 3: Wednesday 23 July 2025		
Time	Activity	Description
8:30-12.30	Visit RABO Bank HQ in Utrecht	RABO Innovations see: https://www.rabobank.com/about-us/innovation Making impact with innovations: generating positive social change in the agri-food and energy sectors RABO Foundation see: https://www.rabobank.nl/en/about-us/rabofoundation Inclusive finance like microfinance in emerging markets; impact investing
12:30-13:30	Lunch*	
13:30-15:30	Continuation of the group assignment	

15:30	Wrap up/summary	Summary of the, feedback from and to the groups, outlook for tomorrow
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DAY 4: Thursday 24 July 2025		
Time	Activity	Description
9.00-12:30	Guest lecture Triodos Bank	Investments and assetmanagement in transition see: https://www.triodos.com/en/about-us
12:30-13:30	Lunch*	
13:30-15:30	Finalization of the group assignment	
15.30	Wrap up/summary	Summary of the day, feedback from and to the groups, outlook for tomorrow

Friday 25 July 2025		
Time	Activity	Description
10:00-12:30	Start of the final presentations	Jury: investor relations manager of a Dutch listed company Avantium (see www.avantium.com) or Ebusco (see www.ebusco.com)
12:30-13:30	Lunch*	
13:30-15:30	Continuation of the final presentations	Presentations
15:30-17:30	Saying goodbye	Drinks at The Grand Living

*Please note: Students must bring/cover their own lunch
The lunch times in the programme can vary, these times are just an indication.

** program: evt. subject to change