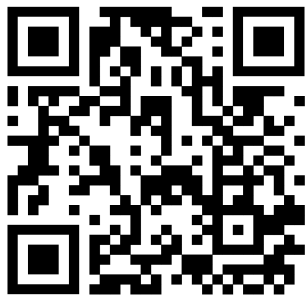


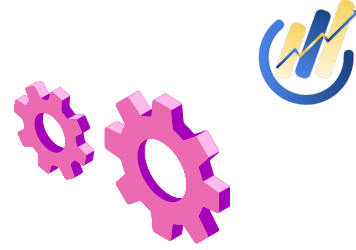
# Quant Finance Workshop

BFS SPRING 2025 | April 28, 2025



Keep an eye out  
for the  
password!





# Table of contents

01

## What is Quant?

Definition, application, tools used, pros & cons

02

## Life in Quant

Pay, work-life balance, challenges and rewards

03

## Recruitment & Career

Education, experience, skills needed, personality, future

04

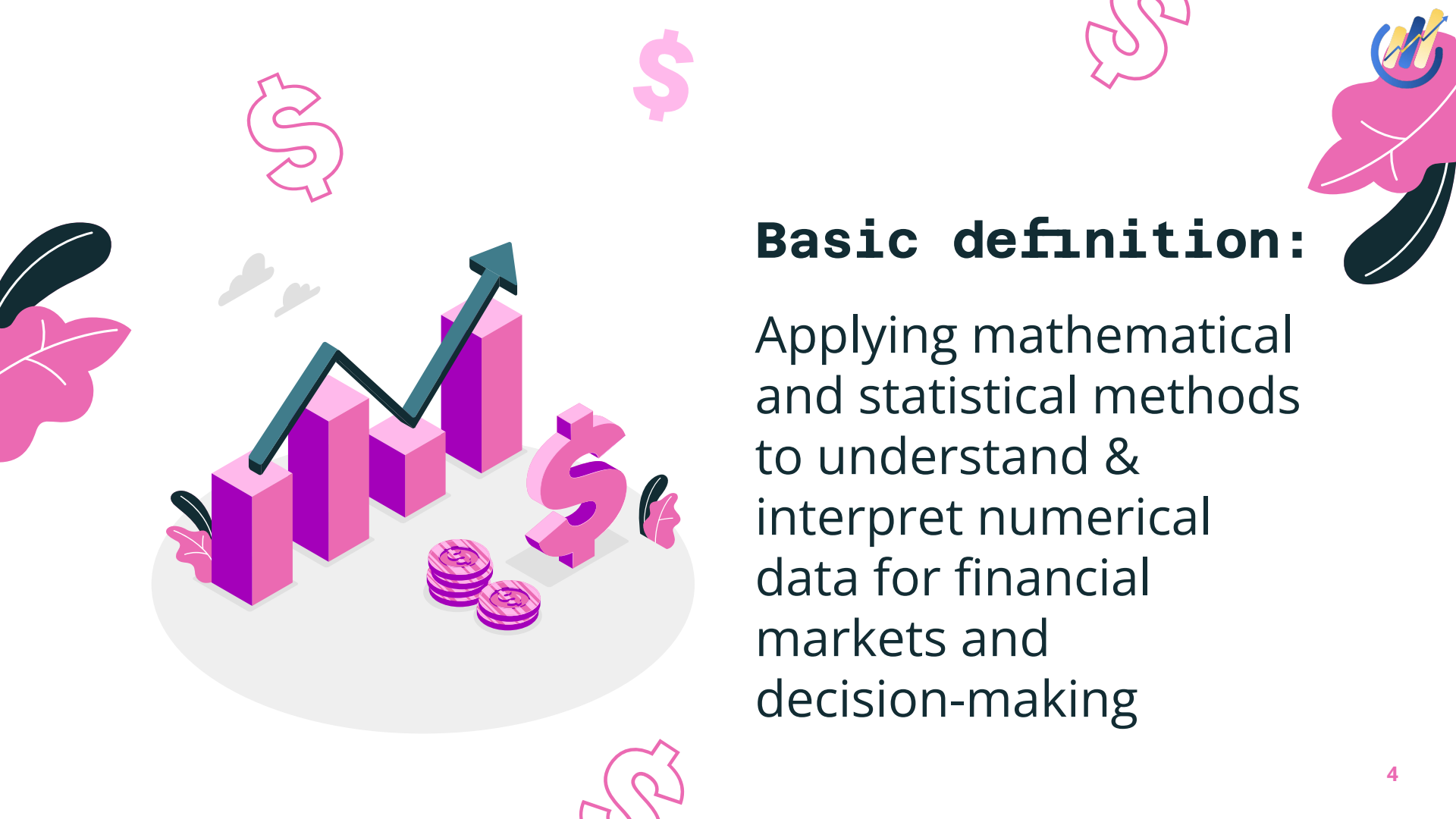
## Additional Resources

01

# What is quant?

Definition, application, tools used, pros & cons





## **Basic definition:**

Applying mathematical and statistical methods to understand & interpret numerical data for financial markets and decision-making

# Functions in Finance



**Asset Pricing**



**Risk  
Management**



**Portfolio  
Optimization**



**Modelling &  
Forecasting**



**Trading /  
Investing**



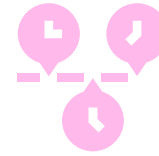
## Tools used

- Statistical software (SPSS, SAS, R, Python)
- Spreadsheet applications (Microsoft Excel)
- Data visualization tools (Tableau, Power BI)
- Specialized financial software (Bloomberg Terminal, FactSet)

# Pros vs Cons of the Industry



- \$\$\$
- Intellectually stimulating
- Prestige
- Learning
- Direct impact
- Diverse roles



- Work/Life balance
- Pressure/stress
- Modelling risk
- Constant adaptation
- Time consuming
- Competitive



# 02

## Life in Quant

Work-life balance, challenges and rewards



# Strategic perspectives



## Daily Life

Hours: often overtime; pay: high compensation



## Culture

Fast, competitive, demanding, results oriented, technology based



## Sense of Accomplishment

Impact, problem solving, innovation, efficiency



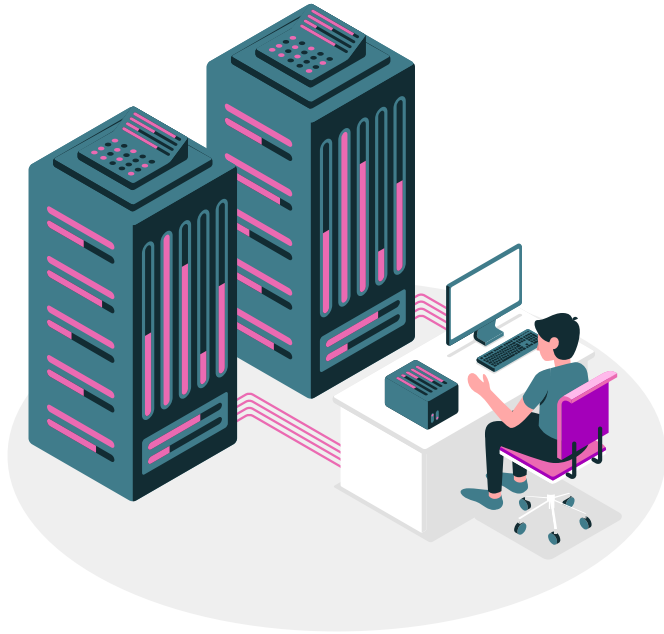
## Teamwork

Depends on the role - communication = key!  
Traders vs sales vs portfolio managers vs IT etc

03

# Recruitment & Career

Education, experience, skills needed,  
personality, future





# Tips for Recruitment

## Education

Quantitative bachelors → MFE / MQF / quantitative Master's/PhD (MBAs not so much)



## Technical Skills

Higher level math & statistics; Programming; Financial Modelling; Machine Learning (increasingly)

## Experience

Internships, personal projects, research experience, competitions



# Soft Skills

Analytical

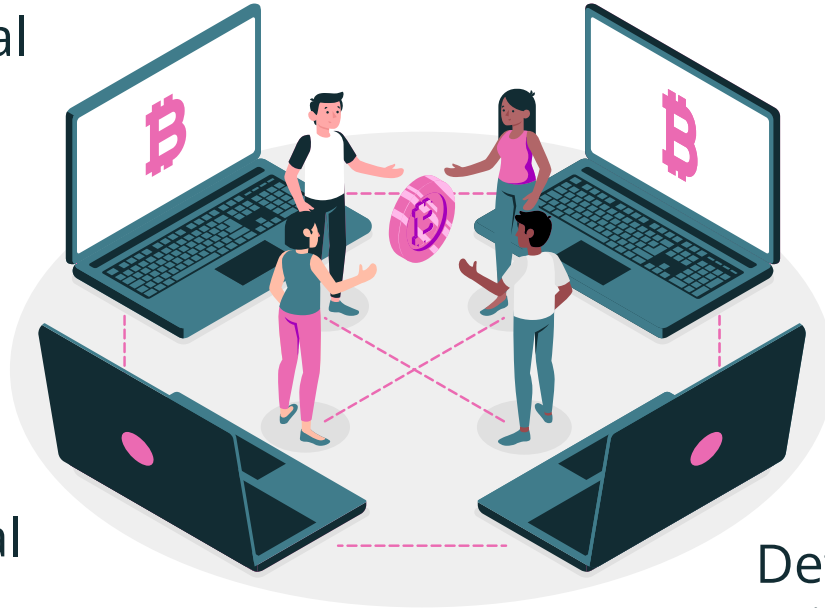
Adaptability

Problem  
solving

Communication

Intellectual  
curiosity

Detail  
oriented





**Sign in  
Sheet**

**Password:  
Mechanix**



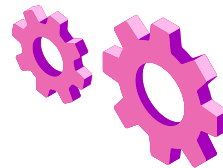


04

# Additional Resources



# If you want to dig deeper...



WallStreetQuants

<https://www.thewallstreetquants.com>

**Bloomberg Opinion**

## Money Stuff



Matt Levine



Investopedia

<https://www.investopedia.com>



PyQuant News

<https://www.pyquantnews.com>



# Questions?

---

Dining Hall run afterwards!





# Thanks !

## Any questions?

youremail@freepik.com

+91 620 421 838

yourwebsite.com

Please keep this slide for attribution

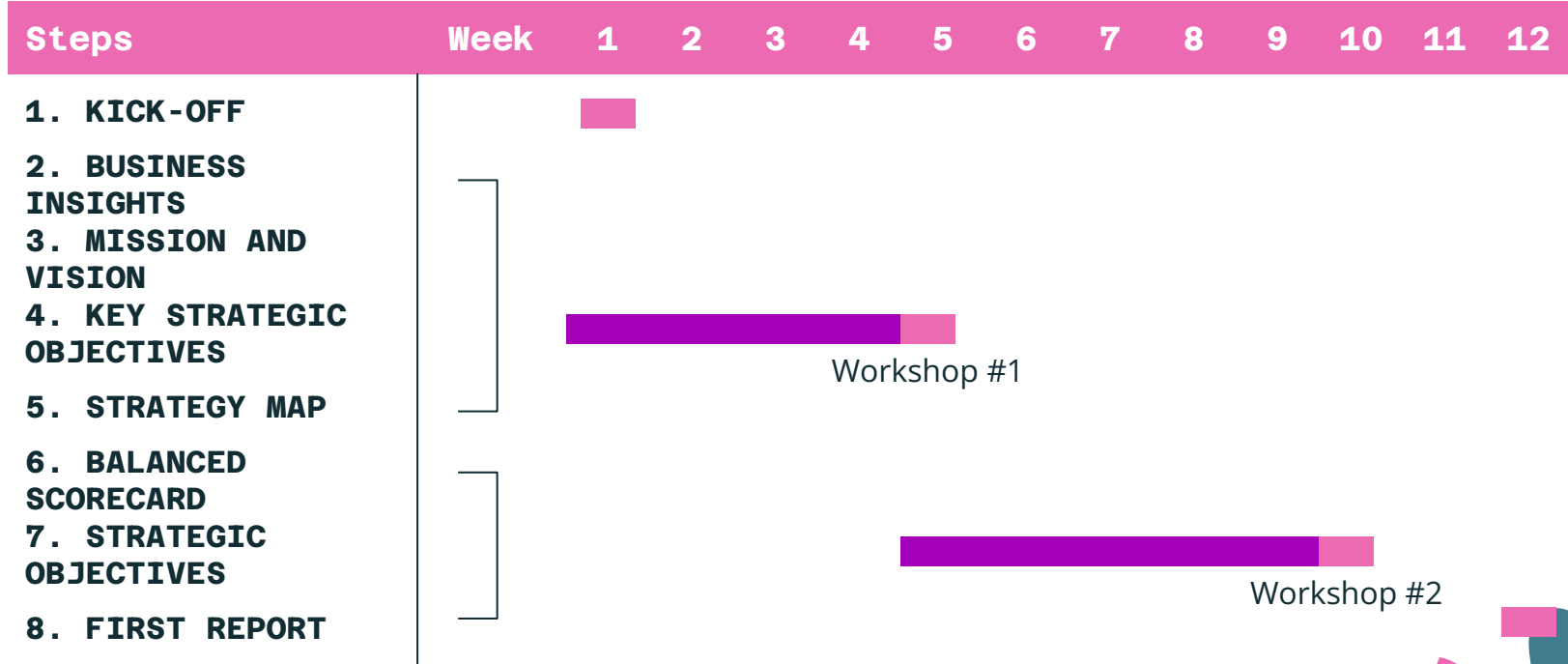


CREDITS: This presentation template was created by **Slidesgo**, and includes icons by **Flaticon**, infographics & images by **Freepik** and illustrations by **Storyset**





# Strategic planning project plan



# Strategic planning project plan



## Mission

Venus has a beautiful name and very high temperatures



## Vision

Jupiter is a gas giant and the biggest planet of them all



## Objectives

Despite being red, Mars is actually a very cold place



## Key initiatives



Saturn is a gas giant composed of hydrogen and helium



# Strategy map & balanced scorecard

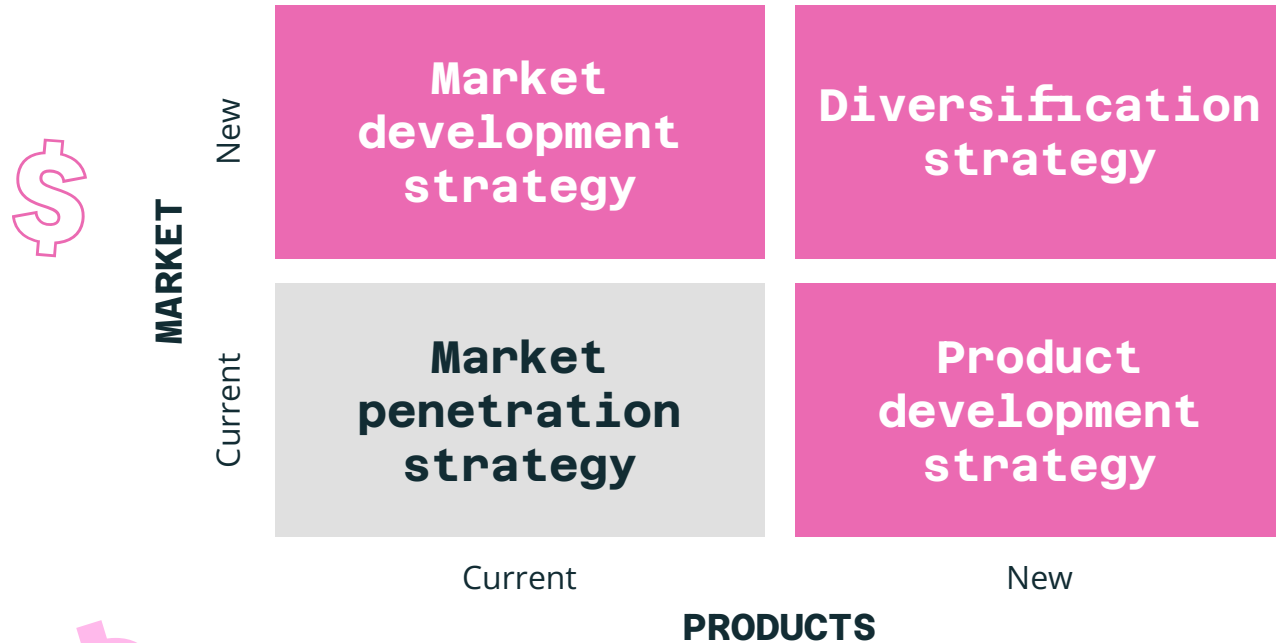


| Perspectives                 | Strategic objectives      |                           |                           |                           |
|------------------------------|---------------------------|---------------------------|---------------------------|---------------------------|
| <b>Financial</b>             | F1 - Insert your own text | F2 - Insert your own text | F3 - Insert your own text | F4 - Insert your own text |
| <b>Customer</b>              | C1 - Insert your own text | C2 - Insert your own text | C3 - Insert your own text | C4 - Insert your own text |
| <b>Internal process</b>      | I1 - Insert your own text | I2 - Insert your own text | I3 - Insert your own text | I4 - Insert your own text |
| <b>Learning &amp; growth</b> | L1 - Insert your own text | L2 - Insert your own text | L3 - Insert your own text | L4 - Insert your own text |





# Strategic options: risks



■ Use a different color for the strategic option you recommend the company to choose

# Impact of the risks

**5%**

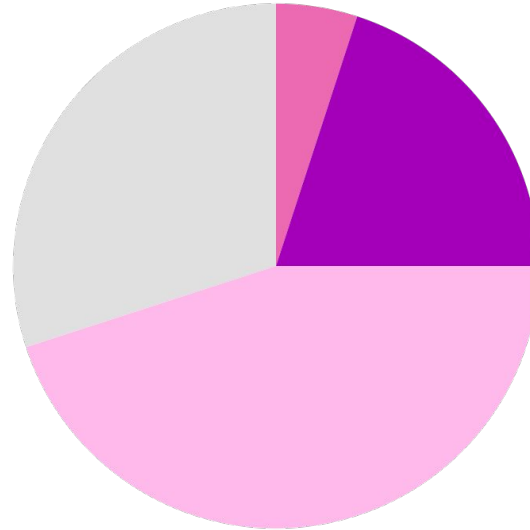
## Saturn

Saturn is a gas giant and has several rings

**45%**

## Jupiter

Jupiter is the biggest planet of them all



**20%**

## Venus

Venus is the second planet from the Sun

**30%**

## Mars

Despite being red, Mars is actually a cold place

\* Follow the link in the graph to modify its data and then paste the new one here. For more info, click [here](#)



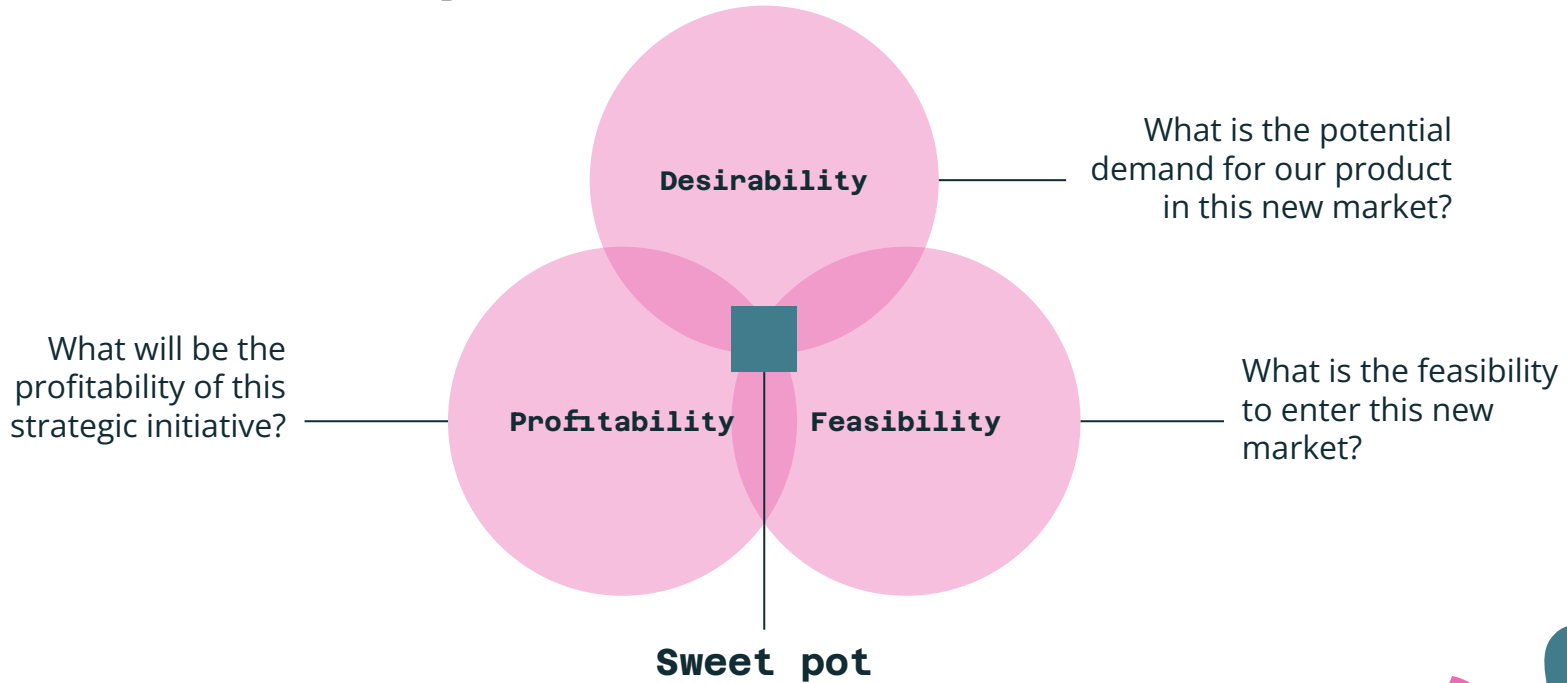
# Key drivers of the profit



|                         | Description  | Example  |
|-------------------------|--|--|
| <b>The situation</b>    | You need to provide a neutral description with facts that you know your audience will agree on | Our company has been selling its products in the US for 10 years, with an annual profit growth above 10% |
| <b>The complication</b> | The complication is a desired change of the current situation                                  | With a market share already above 40%, profit growth will be limited in the US                           |
| <b>The question</b>     | The question that implicitly results from the complication                                     | Should we enter the European market now?   |



# Decisions: new market, new product, new company



# Strategic perspectives



## Jupiter

Jupiter is a gas giant and the biggest planet of them all



## Venus

Venus has a beautiful name and is the second planet from the Sun



## Mars

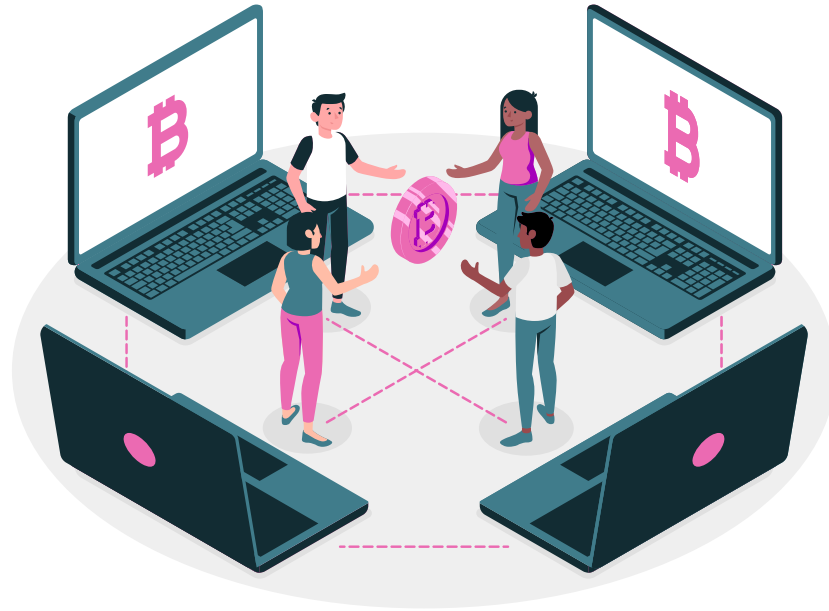
Despite being red, Mars is actually a very cold place



## Mercury

Mercury is the closest planet to the Sun and the smallest of them all

# Awesome words



# Strong business plan



## **Political**

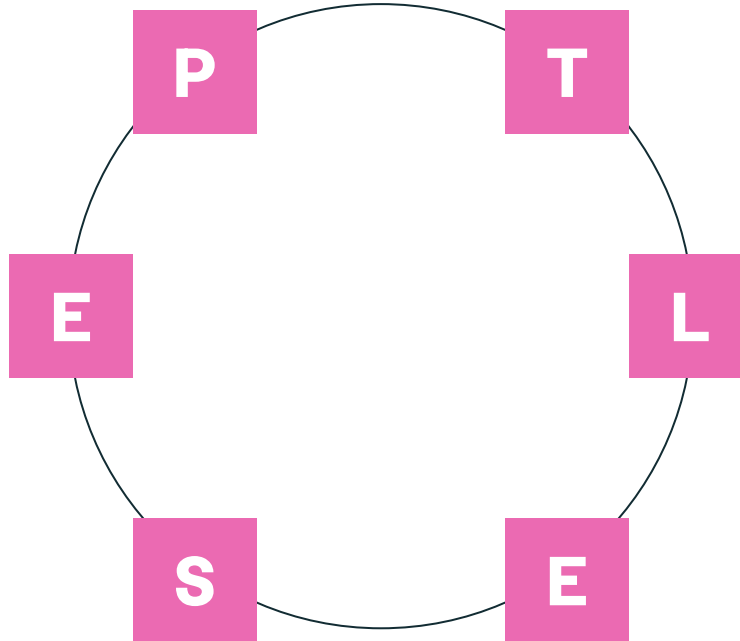
Replace the text with your own text

## **Economical**

Replace the text with your own text

## **Social**

Replace the text with your own text



## **Technological**

Replace the text with your own text

## **Legal**

Replace the text with your own text

## **Environmental**

Replace the text with your own text



# Strong business case

**Project costs**

**\$4M**

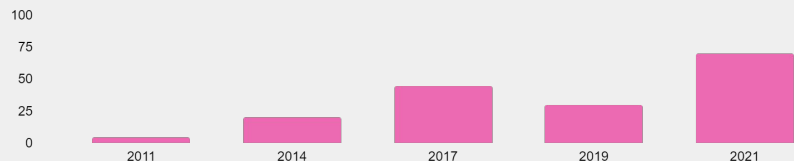
**Tangible benefits**

**\$14M**

**Net present value**

**\$8M**

**Cash flow** (USD million)



**Change impact**



**Intangible benefits**

Insert your own text here

**Strategic alignment**

Insert your own text here

**Resources**

\* Follow the link in the graph to modify its data and then paste the new one here. For more info, click [here](#)

**Sponsor**

Sponsor name

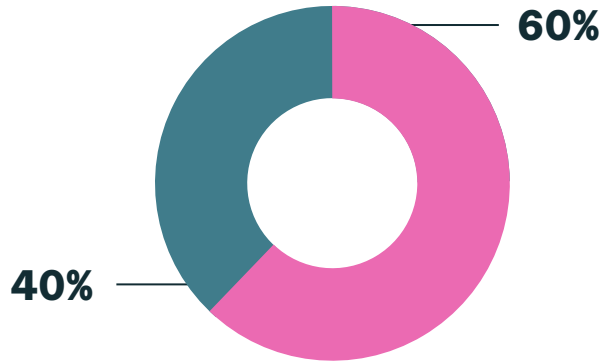
**Manager**

Project manager name

# Financial model

| Inc model      | Historical results |      |      |      | Forecast period |      |      |      |      |
|----------------|--------------------|------|------|------|-----------------|------|------|------|------|
|                | 2014               | 2015 | 2016 | 2017 | 2018            | 2019 | 2020 | 2021 | 2022 |
| Balance sheet  |                    |      |      |      |                 |      |      |      |      |
| Assets         |                    |      |      |      |                 |      |      |      |      |
| Cash           | XX                 | XX   | XX   | XX   | XX              | XX   | XX   | XX   | XX   |
| Accounts       | XX                 | XX   | XX   | XX   | XX              | XX   | XX   | XX   | XX   |
| Inventory      | XX                 | XX   | XX   | XX   | XX              | XX   | XX   | XX   | XX   |
| Current assets | XX                 | XX   | XX   | XX   | XX              | XX   | XX   | XX   | XX   |
| Property       | XX                 | XX   | XX   | XX   | XX              | XX   | XX   | XX   | XX   |
| Goodwill       | XX                 | XX   | XX   | XX   | XX              | XX   | XX   | XX   | XX   |
| Total          | XX                 | XX   | XX   | XX   | XX              | XX   | XX   | XX   | XX   |

# Financial model

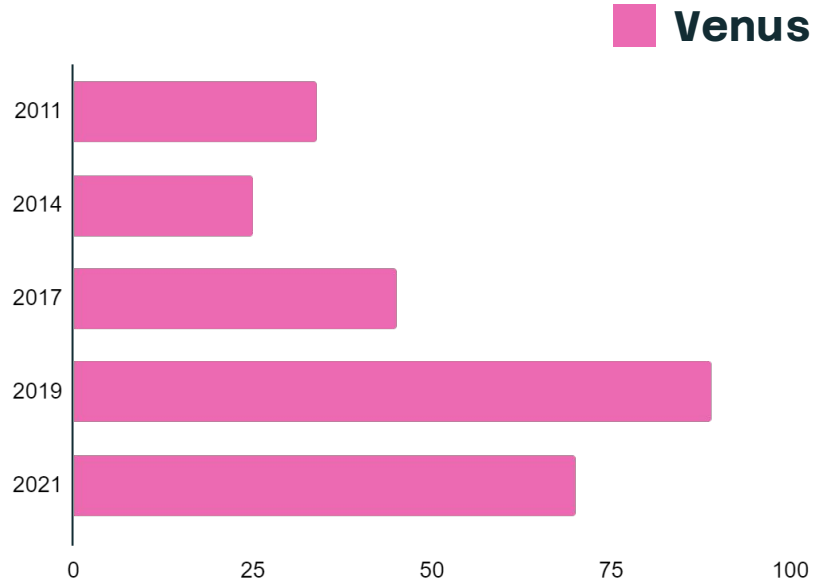


**Venus**

Venus is the second planet from the Sun

**Mars**

Despite being red, Mars is a cold place



\* Follow the link in the graph to modify its data and then paste the new one here. For more info, click **here**



# Pricing strategy

|             | Basic  | Standard   | Advanced   | Leading  |
|-------------|--|--|--|--|
| Level       | 1  | 2  | 3  | 4  |
| Percentage  | 20%  | 70%  | 9%   | 1%   |
| Description | <ul style="list-style-type: none"><li>- Insert your description here</li><li>- Insert your description here</li><li>- Insert your description here</li></ul> | <ul style="list-style-type: none"><li>- Insert your description here</li><li>- Insert your description here</li><li>- Insert your description here</li></ul> | <ul style="list-style-type: none"><li>- Insert your description here</li><li>- Insert your description here</li><li>- Insert your description here</li></ul> | <ul style="list-style-type: none"><li>- Insert your description here</li><li>- Insert your description here</li><li>- Insert your description here</li></ul> |





# Consulting proposal



## Services

Mercury is the closest planet to the Sun



## Fees

Venus is the second planet from the Sun



## Invoices

Despite being red, Mars is actually a cold place



## Expenses

Jupiter is the biggest planet in the Solar System



## Materials

Saturn is composed of hydrogen and helium



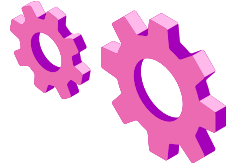
## Terms

Neptune is the farthest planet from the Sun



**A picture is worth a thousand words**





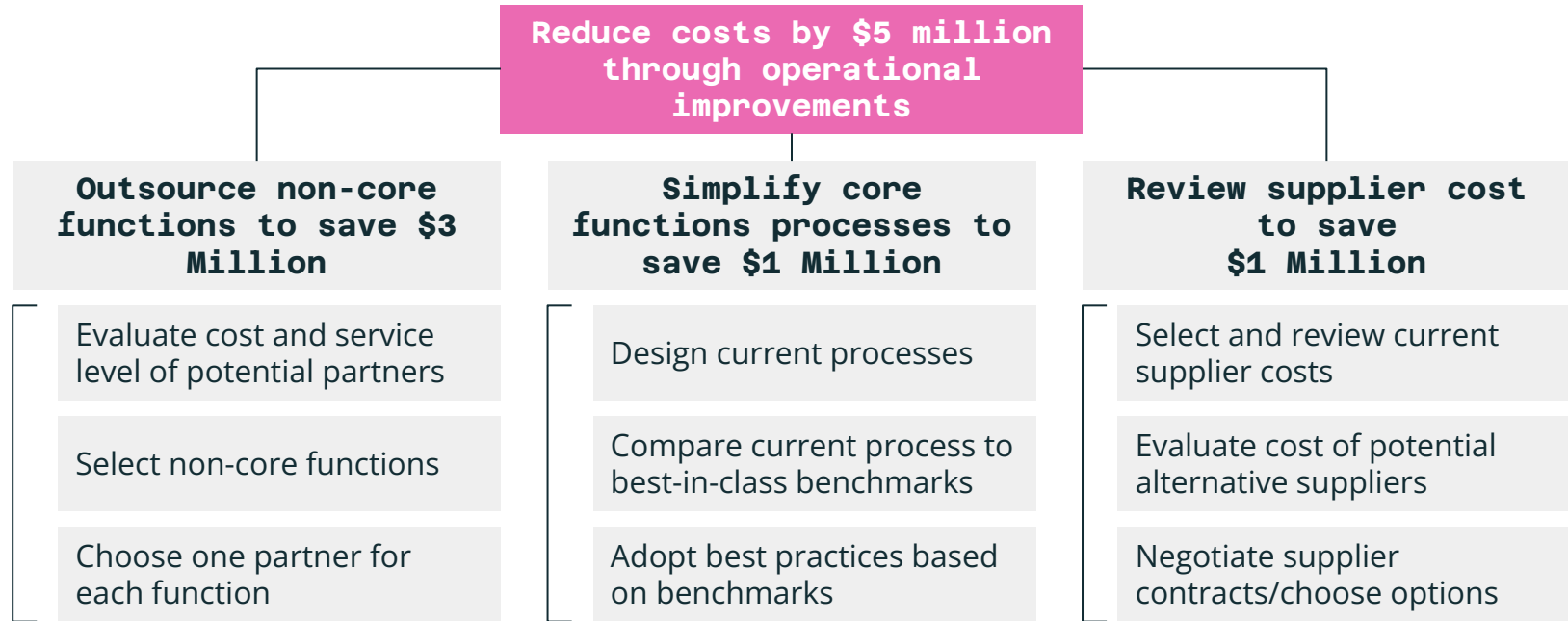
## **A picture always reinforces the concept**

Images reveal large amounts of data, so remember: use an image instead of a long text. Your audience will appreciate it



# Answer and supporting arguments

How can the company reduce its cost by 10%?



# Initiative prioritization matrix: impact & effort

## Impact

An initiative with a high impact would mean one of the following:

- The initiative needs to happen in order to achieve the desired future state
- The initiative will significantly reduce the cost or increase our revenue

## Effort

The “effort” criteria is assessed based on the following concepts:

- Ease of implementation
- Time frame required
- Resources required (number of people, capital investment, etc.)

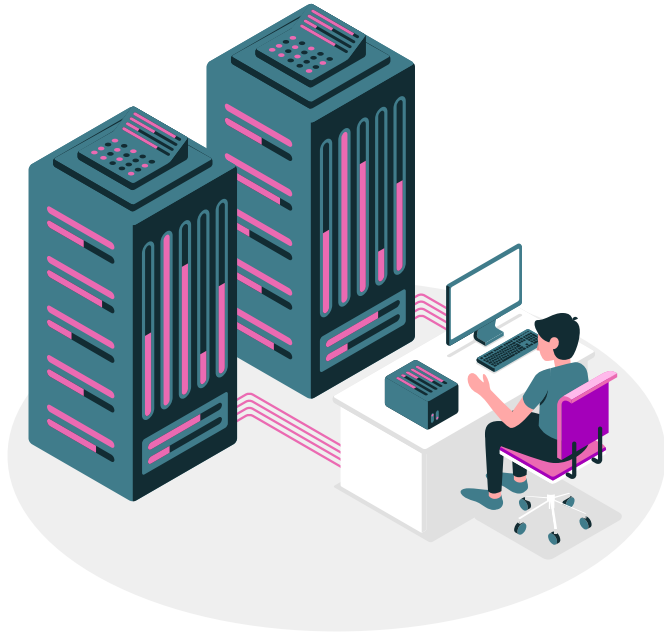
# Prioritization matrix

| Initiative |                                     | Impact |  |  | Effort    |
|------------|-------------------------------------|--------|--|--|-----------|
| 1          | List all your potential initiatives |        |  |  | Very high |
| 2          | List all your potential initiatives |        |  |  | High      |
| 3          | List all your potential initiatives |        |  |  | Low       |
| 4          | List all your potential initiatives |        |  |  | High      |
| 5          | List all your potential initiatives |        |  |  | Very high |
| 6          | List all your potential initiatives |        |  |  | High      |

03

# Change management

You can enter a subtitle here if you need it



# Change management approach

Do you know what helps you make your point clear?

Lists like this one:

- They're simple
- You can organize your ideas clearly
- You'll never forget to buy milk!

And the most important thing: the audience won't miss the point of your presentation





# Business case



1

Mercury is the closest planet to the Sun

Business  
name

4

Saturn is composed of hydrogen and helium

2

Jupiter is the biggest planet in the Solar System

Company  
logo  
here

5

Despite being red, Mars is actually a very cold place

3

Venus is the second planet from the Sun

xx/xx/xx

6

Neptune is the farthest planet from the Sun



# Competitor comparison table



| Attributes   | Competitor A | Competitor B | My business |
|--------------|--------------|--------------|-------------|
| Price        | \$360        | \$320        | \$300       |
| Quality      | Low          | Medium       | High        |
| Customer age | 20-40        | 18-45        | 18-50       |
| Reputation   | Bad          | Average      | Good        |
| Location     | Spain        | Italy        | USA         |

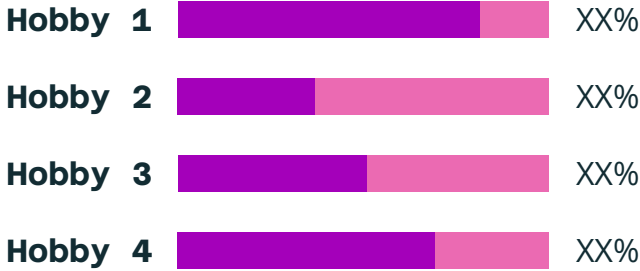




# Buyer persona




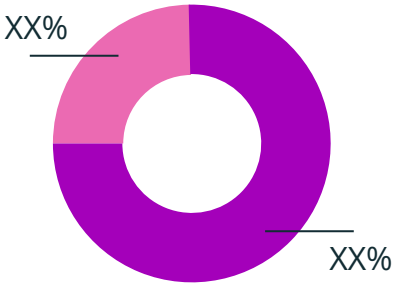
|            |              |
|------------|--------------|
| Name       | Anna Wilson  |
| Age        | XX years old |
| Occupation | Lawyer       |



Venus

Venus has a beautiful name and is the second planet from the Sun. It's terribly hot, even hotter than Mercury, and its atmosphere is extremely poisonous. It's the second-brightest natural object in the night sky after the Moon

-  **Mars**  
Mars is actually a cold place
-  **Mercury**  
Mercury is quite a small planet

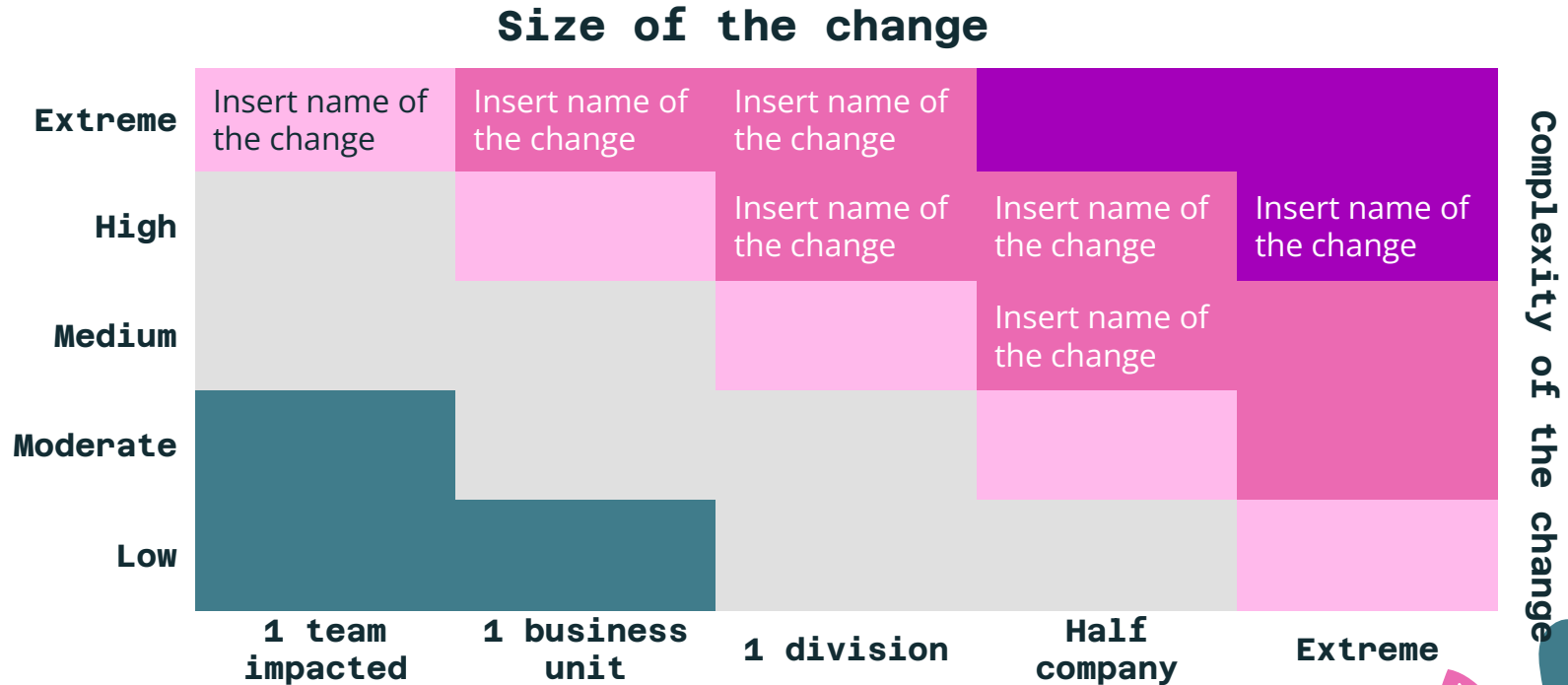


# Implement, track & manage progress

## Manage progress

| Progress |                            | Status                                       | Link   |
|----------|----------------------------|--|--|
| Venus    | <div><div></div></div> 40% | <div><div></div><div></div><div></div></div> | <a href="http://www.yourlinkhere.com">www.yourlinkhere.com</a> |
| Mars     | <div><div></div></div> 35% | <div><div></div><div></div><div></div></div> | <a href="http://www.yourlinkhere.com">www.yourlinkhere.com</a> |
| Neptune  | <div><div></div></div> 70% | <div><div></div><div></div><div></div></div> | <a href="http://www.yourlinkhere.com">www.yourlinkhere.com</a> |
| Jupiter  | <div><div></div></div> 15% | <div><div></div><div></div><div></div></div> | <a href="http://www.yourlinkhere.com">www.yourlinkhere.com</a> |
| Earth    | <div><div></div></div> 85% | <div><div></div><div></div><div></div></div> | <a href="http://www.yourlinkhere.com">www.yourlinkhere.com</a> |
| Ceres    | <div><div></div></div> 60% | <div><div></div><div></div><div></div></div> | <a href="http://www.yourlinkhere.com">www.yourlinkhere.com</a> |

# Change management strategy & plan



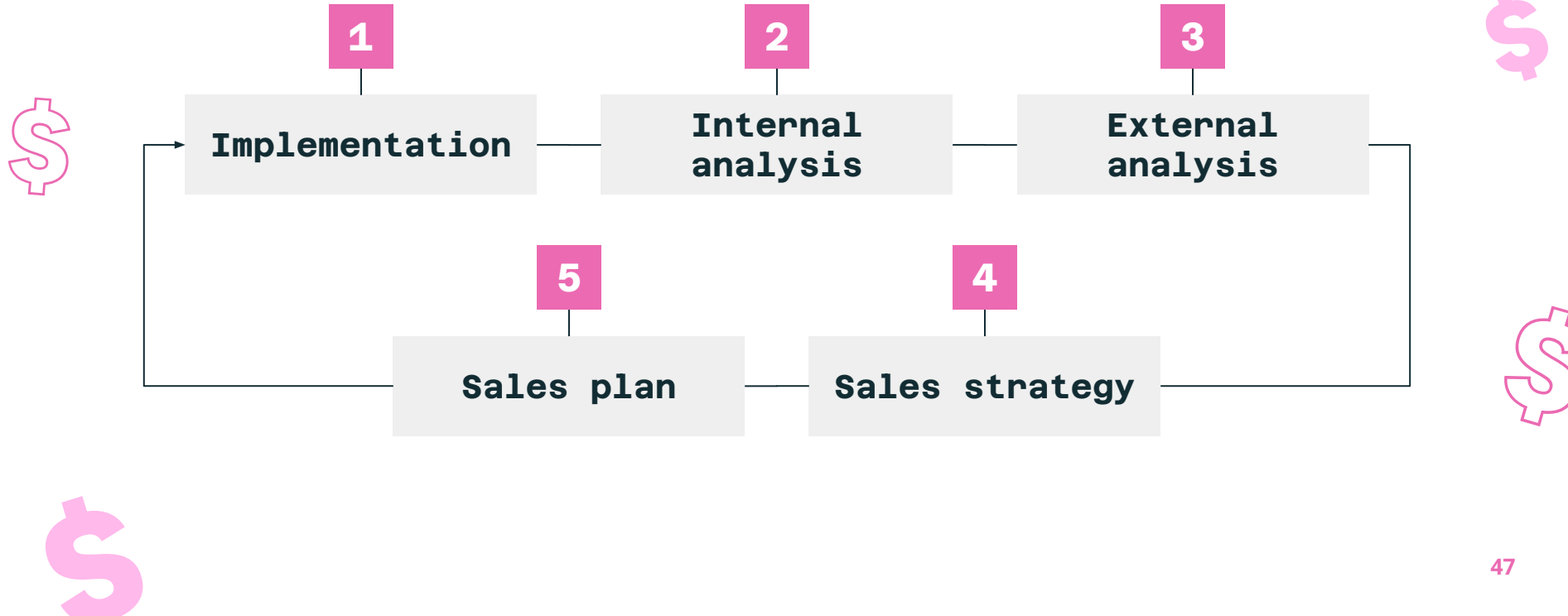
# 04

# Implementing changes

You can enter a subtitle here if you need it



# Sales and strategy plan



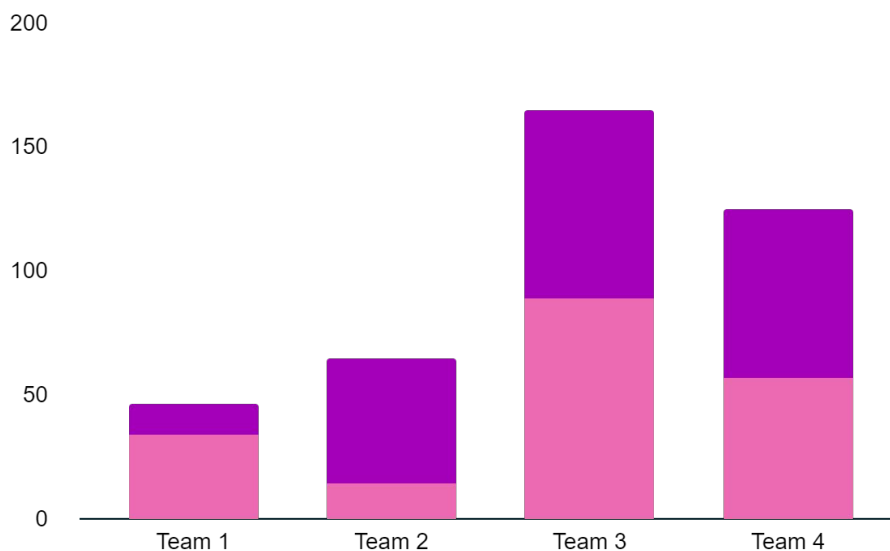


**\$489 , 300**

Big numbers catch your audience's attention



# About the terms of the agreement



## **Venus**

Venus is the second planet from the Sun

## **Mars**

Despite being red, Mars is actually a cold place

\* Follow the link in the graph to modify its data and then paste the new one here. For more info, click **here**



**\$20,000**

Mars is actually a cold planet



**\$15,000**

Venus has a beautiful name



**\$10,000**

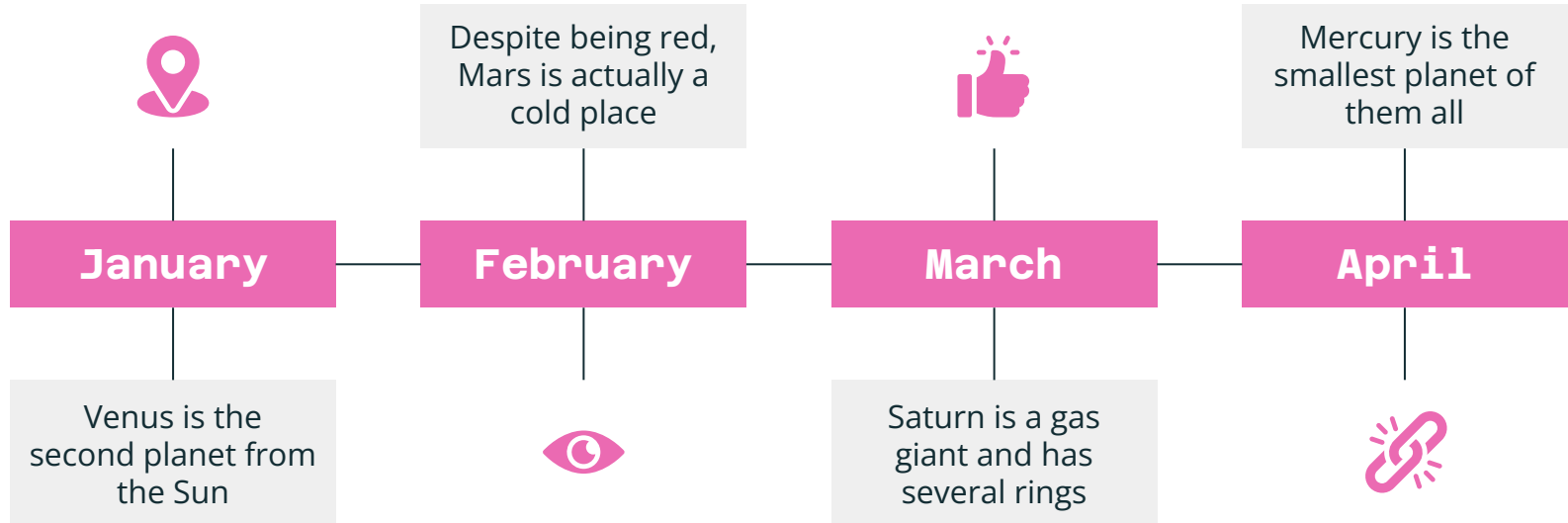
Mercury is a very small planet



**\$45,000**

Saturn has several rings

# Management approach

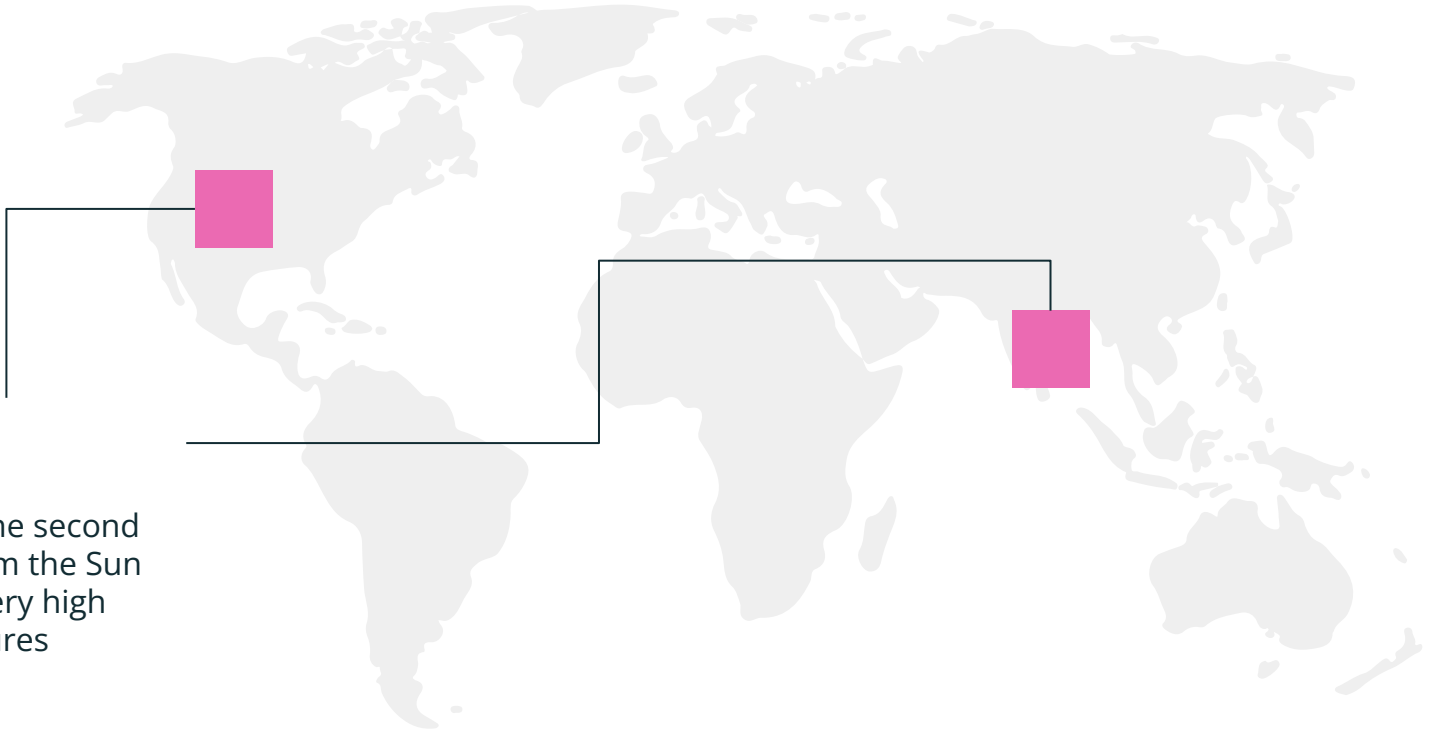


# Strategic alliances



## Venus

Venus is the second planet from the Sun and has very high temperatures





# Answers and arguments




**Write your question**

**Write your answer**

**Saturn**

Saturn is a gas giant and has several rings. It's composed of hydrogen and helium. It was named after the Roman god of wealth and agriculture




**Venus**

Venus has a beautiful name and is the second planet from the Sun. It's terribly hot, even hotter than Mercury, and its atmosphere is poisonous

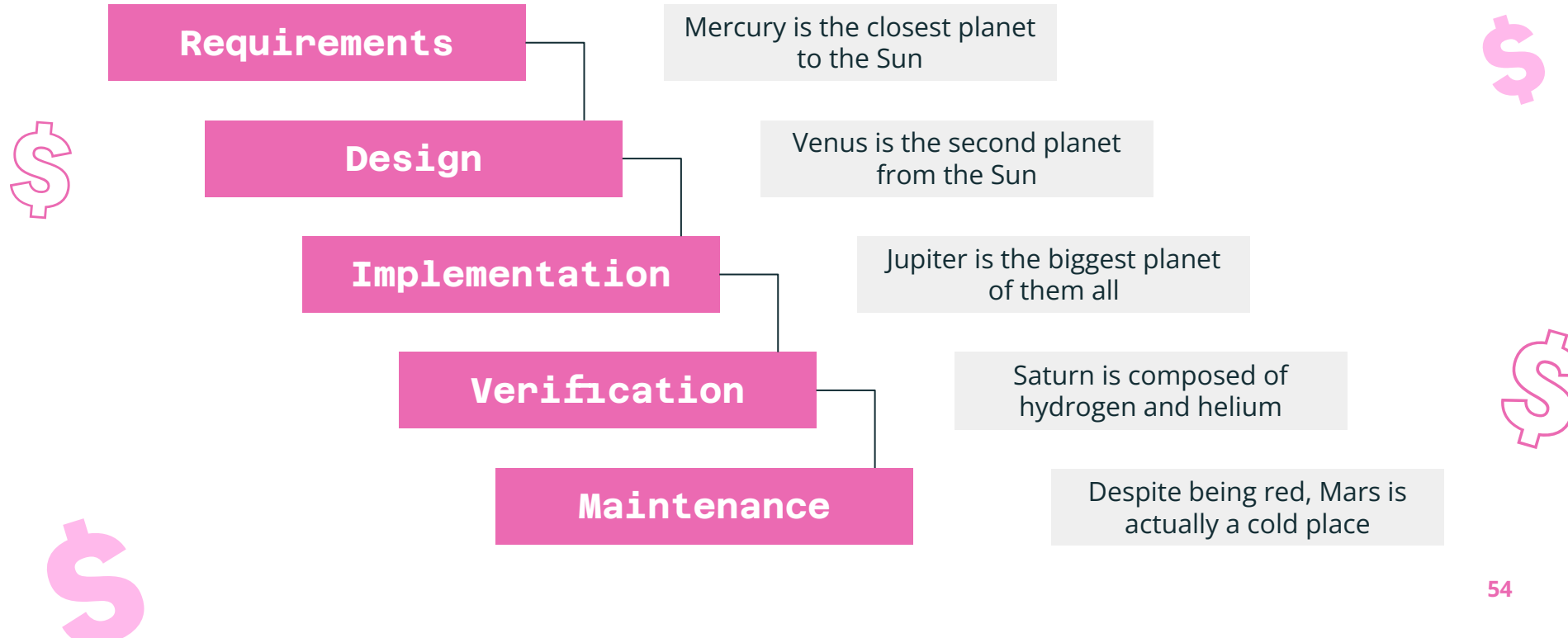
**Mars**

Despite being red, Mars is a cold place. It's full of iron oxide dust, which gives the planet its reddish cast. It's the fourth planet from the Sun





# Waterfall management plan



# Maturity model

## Basic

Mercury is the closest planet to the Sun and the smallest in the Solar System

30%

## Standard

Venus has a beautiful name and is the second planet from the Sun

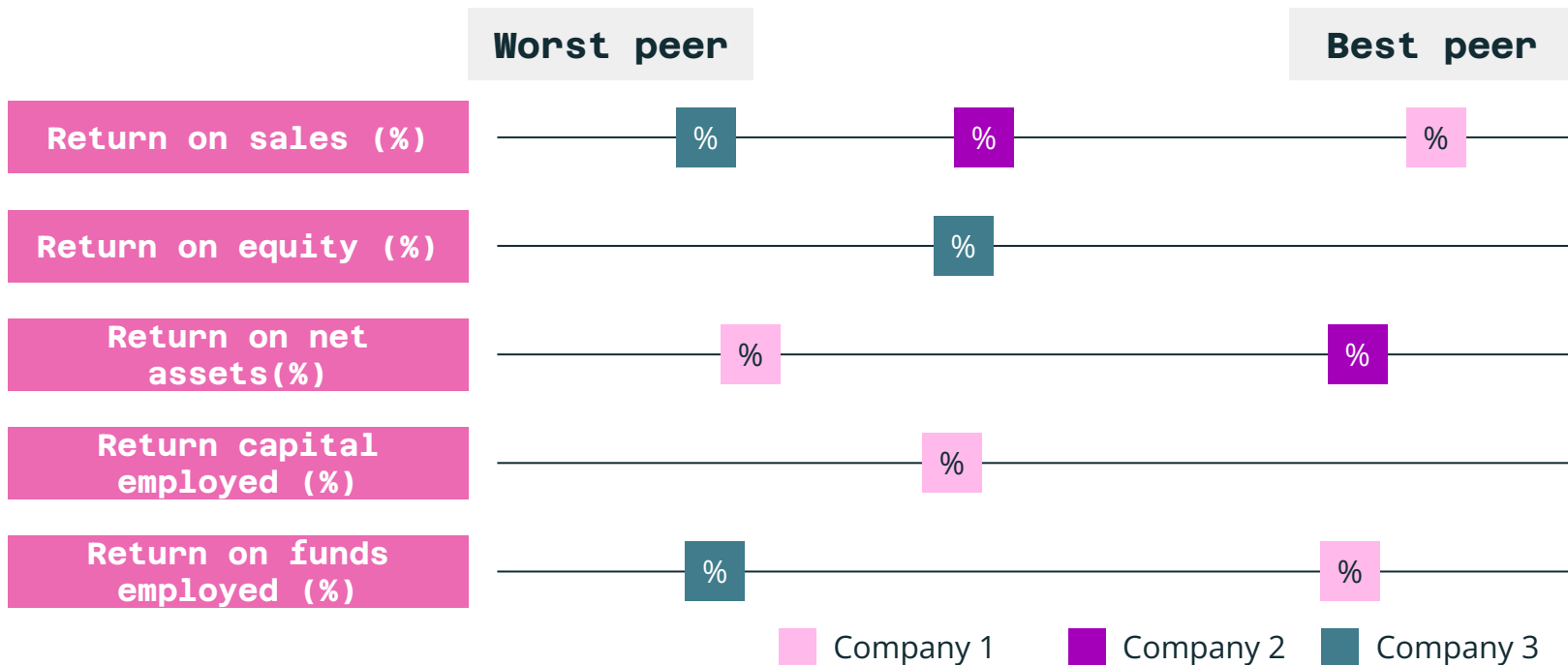
50%

## Advanced

Despite being red, Mars is actually a cold place. It's full of iron oxide dust

70%

# Profitability ratios





# Top 10 questions of business plans

1

What is your situation?

6

Who are the key players?

2

What is your vision?

7

How to make a difference?

3

How to reach your vision?

8

What is your marketing plan?

4

What do you offer?

9

What are your economics?

5

How big is the market?

10

What do you need to start?

# Demo software & app

You can replace the image on the screen with your own work. Just right-click on it and select "Replace image"



# Out team



**John Jimmy**

You can replace the image  
on the screen with your own



**Jenna Doe**

You can replace the image  
on the screen with your own

# Thanks !

## Any questions?

youremail@freepik.com

+91 620 421 838

yourwebsite.com

Please keep this slide for attribution



CREDITS: This presentation template was created by **Slidesgo**, and includes icons by **Flaticon**, infographics & images by **Freepik** and illustrations by **Storyset**





# Alternative resources

Here's an assortment of alternative resources whose style fits that of this template:

## Vectors

- NFT Isometric Illustrations
- E-Wallet Isometric Illustrations
- Construction costs Isometric Illustrations
- Downfall Isometric Illustrations
- Generating new leads Isometric Illustrations
- Credit assessment Isometric Illustrations
- Finance leaders Isometric Illustrations
- Business solution Isometric Illustrations
- Business vision Isometric Illustrations
- Money stress Isometric Illustrations





# Resources

Did you like the resources on this template? Get them for free at our other websites:

## Vectors

- Money income Isometric Illustrations
- Conversion rate optimization Isometric Illustrations
- Marketing consulting Isometric Illustrations
- Refund Isometric Illustrations
- Business decisions Isometric Illustrations
- Server Isometric Illustrations
- Investment data Isometric Illustrations
- Finance Isometric Illustrations
- Bitcoin P2P Isometric Illustrations
- Bitcoin Isometric Illustrations





# Resources

Did you like the resources on this template? Get them for free at our other websites:

## Photos

- Portrait of a young businesswoman holding eyeglasses in hand against gray backdrop
- Smiley man posing for cv medium shot
- Front view woman writing on notebook
- Businessman holding a bitcoin close-up



# Instructions for use

If you have a free account, in order to use this template, you must credit [Slidesgo](#) by keeping the [Thanks](#) slide. Please refer to the next slide to read the instructions for premium users.

## **As a Free user, you are allowed to:**

- Modify this template.
- Use it for both personal and commercial projects.

## **You are not allowed to:**

- Sublicense, sell or rent any of Slidesgo Content (or a modified version of Slidesgo Content).
- Distribute Slidesgo Content unless it has been expressly authorized by Slidesgo.
- Include Slidesgo Content in an online or offline database or file.
- Offer Slidesgo templates (or modified versions of Slidesgo templates) for download.
- Acquire the copyright of Slidesgo Content.

For more information about editing slides, please read our FAQs or visit our blog:

<https://slidesgo.com/faqs> and <https://slidesgo.com/slidesgo-school>



# Instructions for use (premium users)

As a Premium user, you can use this template without attributing [Slidesgo](#) or keeping the [Thanks](#) slide.

## You are allowed to:

- Modify this template.
- Use it for both personal and commercial purposes.
- Hide or delete the “Thanks” slide and the mention to Slidesgo in the credits.
- Share this template in an editable format with people who are not part of your team.

## You are not allowed to:

- Sublicense, sell or rent this Slidesgo Template (or a modified version of this Slidesgo Template).
- Distribute this Slidesgo Template (or a modified version of this Slidesgo Template) or include it in a database or in any other product or service that offers downloadable images, icons or presentations that may be subject to distribution or resale.
- Use any of the elements that are part of this Slidesgo Template in an isolated and separated way from this Template.
- Register any of the elements that are part of this template as a trademark or logo, or register it as a work in an intellectual property registry or similar.

For more information about editing slides, please read our FAQs or visit our blog:

<https://slidesgo.com/faqs> and <https://slidesgo.com/slidesgo-school>

# Fonts & colors used

This presentation has been made using the following fonts:

## **Azeret Mono**

(<https://fonts.google.com/specimen/Azeret+Mono>)

## **Open Sans**

(<https://fonts.google.com/specimen/Open+Sans>)

#122c33

#ffffff

#eb6ab2

#ffb9eb

#a400ba

#e0e0e0

#407c8b

#efefef

# Storyset

Create your Story with our illustrated concepts. Choose the style you like the most, edit its colors, pick the background and layers you want to show and bring them to life with the animator panel! It will boost your presentation. Check out **how it works**.



Pana



Amico



Bro



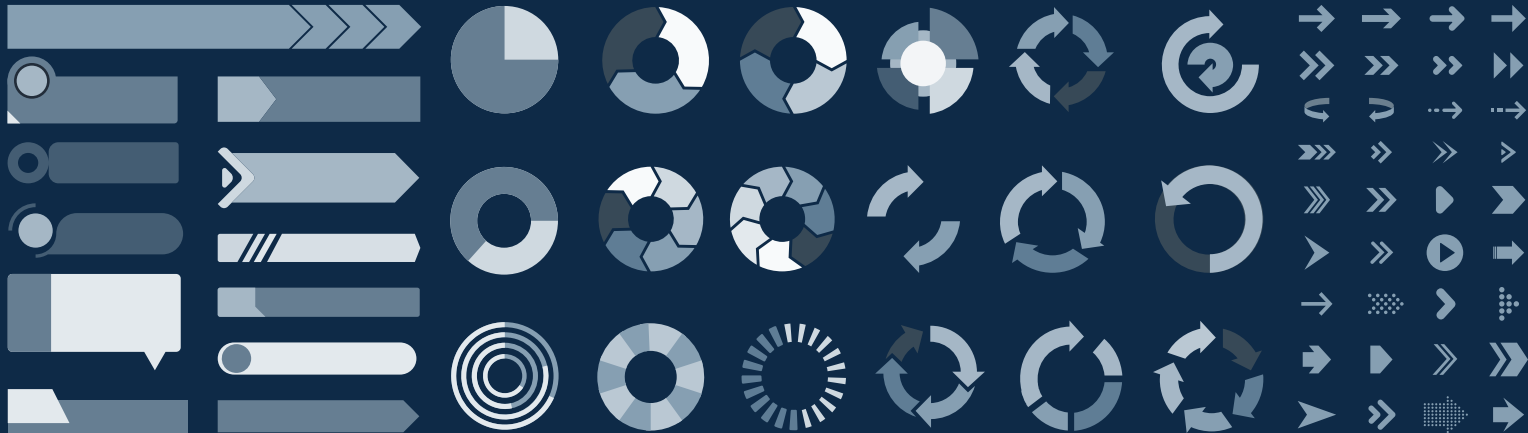
Rafiki



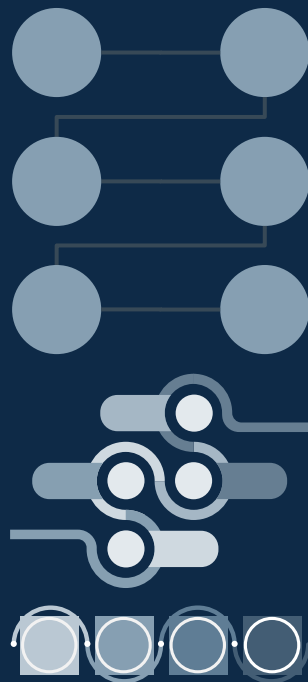
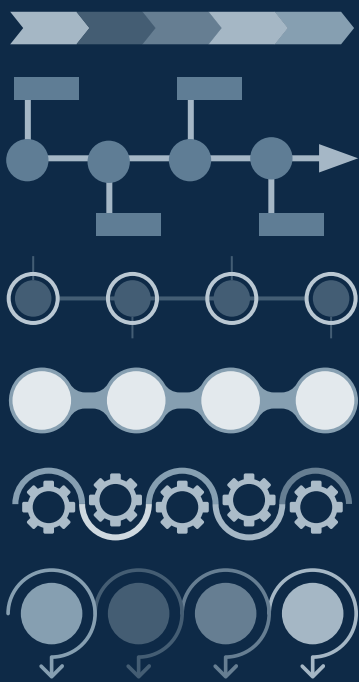
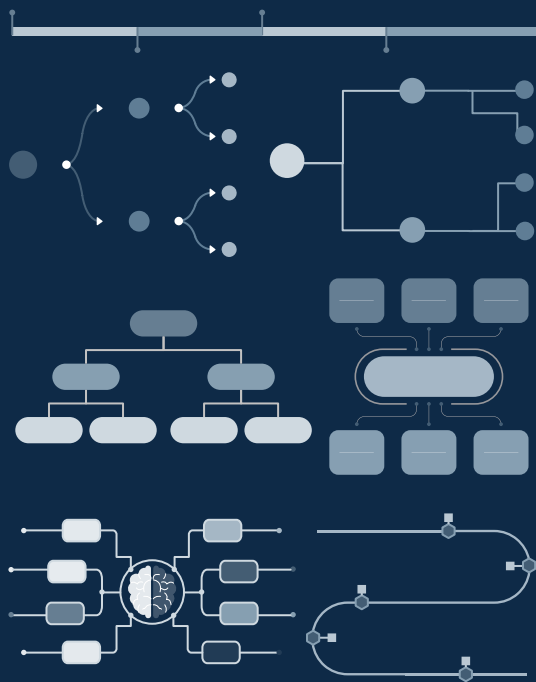
Cuate

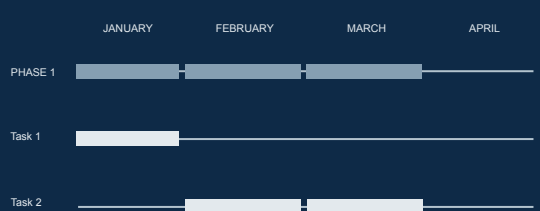
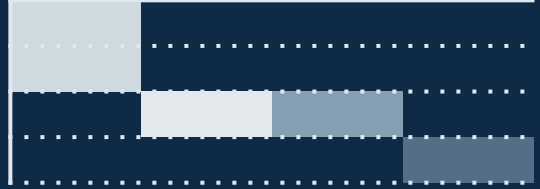
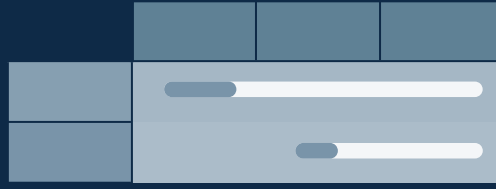
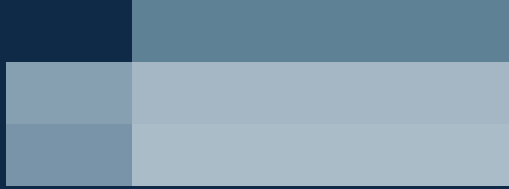
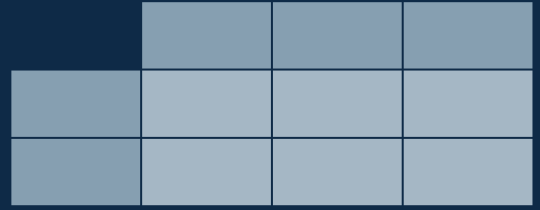
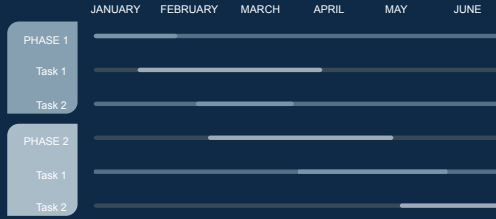
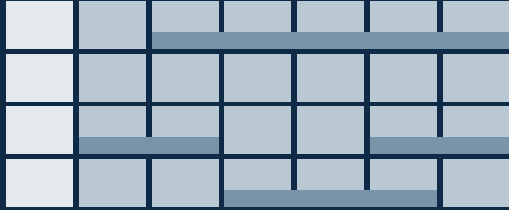
# Use our editable graphic resources...

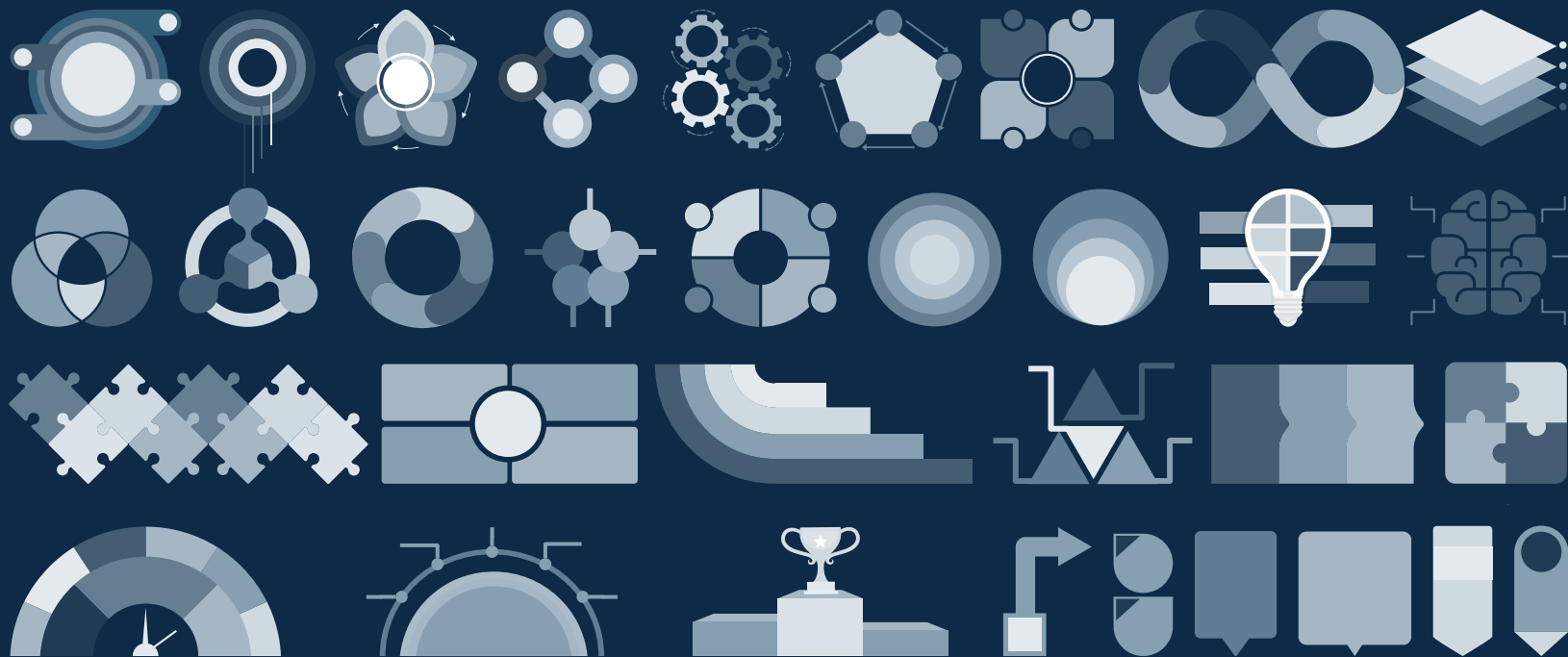
You can easily **resize** these resources without losing quality. To **change the color**, just ungroup the resource and click on the object you want to change. Then, click on the paint bucket and select the color you want. Group the resource again when you're done. You can also look for more **infographics** on [Slidesgo](#).



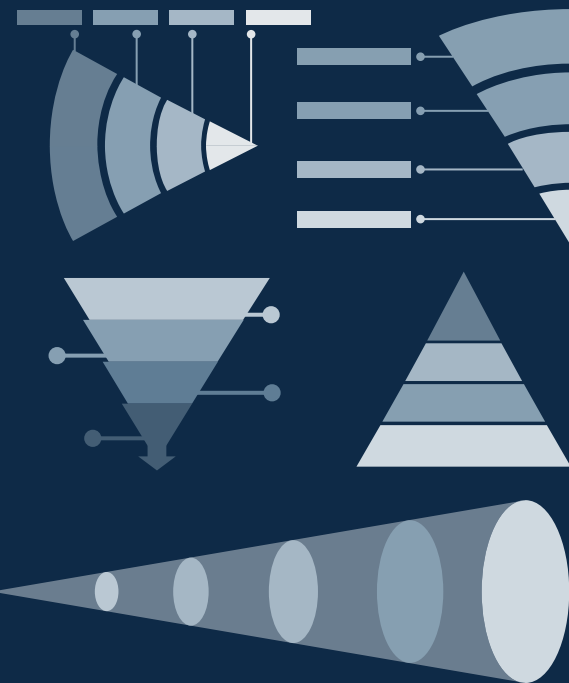
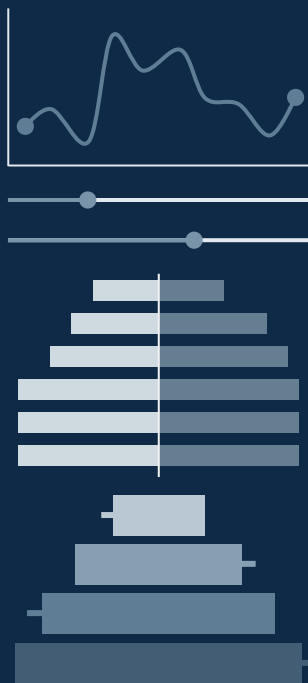
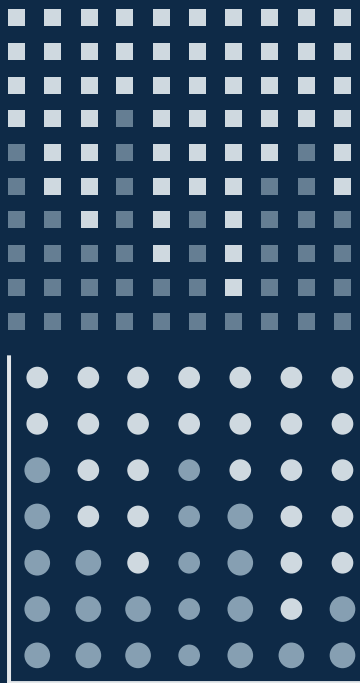












# ...and our sets of editable icons

You can **resize** these icons without losing quality.

You can **change the stroke and fill color**; just select the icon and click on the **paint bucket/pen**.

In Google Slides, you can also use **Flaticon's extension**, allowing you to customize and add even more icons.



## Educational Icons



## Medical Icons



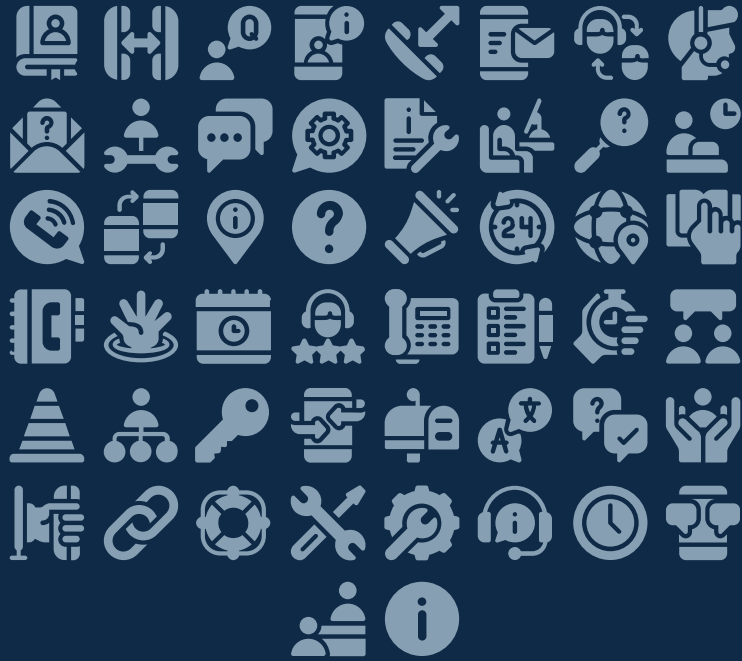
## Business Icons



## Teamwork Icons



## Help & Support Icons



## Avatar Icons



# Creative Process Icons



# Performing Arts Icons



# Nature Icons



# SEO & Marketing Icons





