

PROJECT STUDY IN THE FIELD OF ROBO-ADVISORY

Supervised by a digital corporate start-up of
Allianz SE

PROJECT STUDY FRAMEWORK

1

Creation of a product radar including major competitive products

- Competitive products might arise from Robo Advisors, Pension Schemes, ETF Saving Plans
- Potential product specifications for data collection:
 - Product types: pursued strategy, advantages, disadvantages
 - Cost: service fees, product cost, performance fees, bid-ask spreads
 - Returns: performance, composition of the returns, taxation, pay out type



2

Deduction of a general analysis framework

- Definitions of technical terms related to the discovered competitor products
- Creation of customer clusters



3

Setup of a product comparison tool

- Processing of product specifications, customer clusters



4

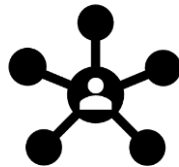
Report of Results

- Conception of a report that can be further used in the field of customer service and sales



REQUIREMENTS AND BENEFITS OF THE PROJECT STUDY

Student Profile



Ideally enrolled in a master's program

Full time employment between
1-3 months is preferred

Practical experience in the field of finance

Committed to work in a start-up environment

What We Offer



Hands-on experience in a start up

Modern and well equipped workspace next to
Theresienwiese

Possibilities to widen the personal network

Attractive compensation

Kick-off as soon as possible

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