

Dario Sgrulletti

Curriculum Vitae

● TEACHING EXPERIENCE

UNIVERSITÀ DEGLI STUDI "LINK CAMPUS UNIVERSITY"

02/11/2023 - CURRENT - Rome, Italy

MBA IN MANAGEMENT, MARKETING AND FINANCE

Titolare dell'insegnamento "Advanced Corporate Finance", "Behavioral Finance: cases and applications", "Applied Lab: Neurofinance"

UNIVERSITÀ DEGLI STUDI "NICCOLÒ CUSANO", TELEMATICA - ROMA (UNICUSANO)

10/03/2022 - CURRENT - Rome, Italy

LECTURER – PROFESSORE A CONTRATTO IN ECONOMIA DEGLI INTERMEDIARI FINANZIARI

<https://ricerca.unicusano.it/author/dario-sgrulletti/>

UNIVERSITY OF ROME "TOR VERGATA"

06/10/2023 - 16/02/2024 - Rome, Italy

TEACHING ASSISTANT IN "ECONOMIA DEGLI INTERMEDIARI FINANZIARI"

Economia degli intermediari finanziari - SECS-P/11 - CLEF - docente responsabile Prof. Alessandro Carretta.

16/02/2022 - 22/07/2022 - Rome, Italy

TEACHING ASSISTANT IN "ECONOMIA DELLE AZIENDE DI CREDITO"

https://economia.uniroma2.it/public/dmd/files/selezioni-e-bandi/esito_TA_avviso_4_2022.pdf

22/09/2021 - 18/02/2022 - Rome, Italy

TEACHING ASSISTANT IN "ECONOMIA DEGLI INTERMEDIARI FINANZIARI"

<https://economia.uniroma2.it/cdl/triennio/clem/corso/75/>

22/02/2021 - 16/07/2021 - Rome, Italy

TEACHING ASSISTANT IN "FINANZA AZIENDALE"

<https://economia.uniroma2.it/cdl/triennio/clem/corso/2010/>

01/02/2021 - CURRENT

CULTORE DELLA MATERIA IN:

- Finanziamenti aziendali
- Corporate and investment banking
- Finanza aziendale
- Economia degli intermediari finanziari
- Investment banking

● PROFESSIONAL EXPERIENCE

04/02/2019 - 13/06/2020

CORPORATE & INSTITUTIONAL BANKING - INSTITUTIONAL CLIENTS SALES AND RELATIONSHIP MANAGEMENT – BANCA FINNAT EURAMERICA

<https://www.bancafinnat.it/it/>

Client Service Specialist - Institutional Clients

Main Activities:

- Relationship Management with Institutional Clients/Investors (Call, Email, Marketing Campaigns)
- New Millennium SICAV Funds Sales & Marketing
- Funds Performance Benchmarking and Peer-to-peer analysis
- IPO on Borsa Italiana (AIM) - Equity Story, Equity Research dissemination, Marketing, Roadshow, Bookbuilding, IR post-IPO
- Production of Contents for Events and supporting their execution (also in cooperation with Borsa Italiana)
- Production of Contents for the Institutional Clients Newsletter
- Financial (Asset Management) Research to support Sales
- Competitive analysis and Market Research for Business Development
- Digital and Social Media Communication Management
- Supporting the implementation of cross-country and cross-channel CRM
- Lead generation - Identify and contact prospective clients through cold calls, email, and social, with the aim of developing relationships and booking meetings for senior sales staff
- Management of the client relationship management system - update with interaction notes and track prospects through the full sales life cycle
- Respond to and manage inbound requests including requests for information, portfolio analysis, fund comparisons etc.
- Reviewing industry publications for news about prospective clients

Asset Management

Main Activities:

- Portfolio management for Institutional Clients
- Check on Clients Portfolios Leverage Limits and Liquidity of Funds (Depositary Bank vs Internal Accounting System)
- Check on Deviation of Clients' Portfolios vs Proprietary Models
- Check on Orders execution

Rome, Italy

22/01/2018 - 22/01/2019

CORPORATE & INSTITUTIONAL BANKING - INSTITUTIONAL CLIENTS SALES AND MARKETING – BNP PARIBAS

<https://www.bnpparibas.it/it/corporate-institutional/corporate-investment-banking/>

CIB - Corporate&Institutional Banking | Global Markets - Institutional Clients

Main Activities:

- Supporting client relationship managers with call and e-mail communication, direct marketing, marketing presentations
- Working with Marketing department to ensure consistent lead generation, ADV and Press Release editing in cooperation with Media Agency
- Preparing standard and/or customised prospect presentation materials, briefing books and collateral materials as well as meeting notes required for external meetings
- Participating in in-house client meetings and conference calls as appropriate
- Conducting analysis, initiating investigations, and responding to internal and external ad-hoc inquiries on a wide variety of topics, including portfolio and product specific information, investment guidelines, compliance issues, legal contracts, and fees
- Acting as a point of contact for Institutional Clients
- Coordinating Institutional Clients communications
- Supporting Sales Senior Managers in the organisation of In-house (Milan) and External (CityWire, MondoInstitutional, etc.) Events and Roadshows
- Capturing and maintaining client data in CRM internal systems
- Qualifying and coordinating Requests for Information/Due Diligence Questionnaires, supporting in KYC and working with internal teams to ensure that each one receives the proper response
- Interacting directly with key investment decision makers as Institutional Clients including mutual funds, pension funds, banks, asset managers, insurances, etc.
- KPI reporting (daily orders and trades)
- Product Presentation Pitches and Brochures updating and translating
- Performance Reviews reporting to Clients

Mobility: Milan, Lisbon and in the north area of Italy

Rome, Italy

● EDUCATION

2020-2023 XXXVI Cycle - Università degli Studi di Roma "Tor Vergata"

PHD IN MANAGEMENT BANKING AND FINANCE TRACK – University of Rome "Tor Vergata"

17/07/2023 - NO EXP DATE - Università della Calabria, Scuole di Metodologia per la Ricerca Sociale

ANALISI ECONOMETRICHE – SUMMER SCHOOL UNICAL 2023

05/09/2022 - NO EXP DATE - Università degli Studi di Napoli "Parthenope", Dipartimento di Studi Aziendali e Quantitativi

METODI E TECNICHE DI RICERCA IN BANCA E FINANZA – SCUOLA ESTIVA ADEIMF 2022

03/11/2021 - NO EXP DATE - Soldiers Field, Boston, United States

DATA SCIENCE FOR BUSINESS – Harvard Business School Online

2016 - 2018 - Rome, Italy

MASTER'S DEGREE IN ECONOMICS AND MANAGEMENT – University of Rome "Tor Vergata"

Thesis Title: Bank and CRM: the case of BNP Paribas

110/110 *cum Laude*

2013 - 2016 - Rome, Italy

BACHELOR'S DEGREE IN ECONOMICS AND MANAGEMENT – University of Rome "Tor Vergata"

● GRANTS AND AWARDS

Honours and awards

2020-2023 SCHOLARSHIP, PH.D. IN BANKING AND FINANCE, UNIVERSITY OF ROME TOR VERGATA

2017 NATIONAL AWARD - MARKETING IN BANKING & FINANCE - 1° PLACE IN ITALY

First Place in Italy at "Premio Marketing per l'Università" - SIM (Società Italiana Marketing) sponsored by BNL - BNP Paribas Group

Title: Millennials Mon Amour

Goal: Marketing plan with the objective of implementing clients targeted on Millennials segment

<http://www.premiomarketing.com/sp/le-edizioni-precedenti.3sp> <https://economia.uniroma2.it/economia/186-1727/primo-posto-29-edizione-del-premio-marketing-per-luniversita-societa-italiana-marketing#.X3SO82qzblU> <https://economia.uniroma2.it/commedia/home/102-1340/primo-posto-nella-29-edizione-del-premio-marketing-sim-2017>

● RESEARCH INTERESTS

Communication in Finance, Investor Relations, Financial Markets, Financial Information Dissemination, Social Media Analysis, IPOs, Listed Firms, CEOs Communication, ESG in Financial Markets, Financial Institutions Management, Text Analytics in Finance

● ARTICLES IN REFEREED JOURNALS

Filotto, U., Sgrulletti, D., & Stella, G. P. (2023). CEOs on LinkedIn, ESG Communication and Listed SMEs Stock Performance During COVID-19 Pandemic. *Global Business Review*, 0(0).

<https://doi.org/10.1177/09721509231192174>

● CONFERENCES, LECTURES AND SEMINARS

Conference

Department of Economics University of Campania "Luigi Vanvitelli"

The 2023 International Conference in Banking and Financial Studies Finance

Working paper: CEO features, LinkedIn activities and SMEs stock performance during COVID-19 pandemic

Other Conferences attended

ADEIMF Summer Conference 2021

ADEIMF Winter Conference 2022

1st Conference on Sustainable Banking & Finance CSBF 2023
4th CGRM 2023 International Conference
Sustainable and Impact Investments International Conference 2023

Lectures attended

University of Rome "Tor Vergata" - PhD in Management (2020-2023)
Python for webscraping
La ricerca europea: Fondi, Progettazione, Gestione
La regolamentazione bancaria Europea
Officina di NeuroEconomia
Workshop of Quantitative Finance 2022
Neurofinanza: neuroscienze e decisioni finanziarie
The Power of Ideas: Stakeholder Theory and Stakeholder Capitalism
Coding and Data Analysis for Finance
"The Twin Peaks model for financial sector regulation"
Internal Financial Intermediation Workshop
Banking Supervision and Risk Management in Central Banks

Seminars

Master of Science in Business Administration - 2022
Innovation in Banking and Digital Finance

Guest Speaker at Master Universitario "Economia e Management della Comunicazione e dei Media" – University of Rome "Tor Vergata"

2019 - More info about the Master: <https://economia.uniroma2.it/commedia>
https://www.linkedin.com/posts/dario-sgrulletti-4a0470108_marketing-marketing-comunicazione-activity-6602615996014448640-kues

● **NETWORKS AND MEMBERSHIPS**

09/10/2021 - CURRENT

Associato corrispondente - ADEIMF

ADEIMF - Associazione dei Docenti di Economia degli Intermediari e dei Mercati Finanziari e Finanza

09/10/2021 - CURRENT

University Ambassador, University Committee – CFASI

CFA® Society Italy was founded in 1999 as a non-profit organization of investment professionals who agree to abide by the CFA Institute Code of Ethics and Standards of Professional Conduct.