TEACHING GUIDE - 2026-2027

Private Banking & Asset Management

UGRA_007173

Departments	Department of Economics, Finance & Accounting
Teaching Languages	English and Spanish
ECTS	4
Teacher responsible	Cristobal Antonio Agudo Llobera - cristofor.agudo@esade.edu

Course Goals

The aim of this subject is to familiarise students with private banking and how it works. We explore the two key factors which help with private banking clients investments: financial factor and fiscal factor. Thus, on the one hand, we will carry out in-depth analyses of the different types of assets and investment vehicles used today in wealth management, and, on the other, we explore the different taxes affecting investors, determining the impact these have on investment decisions. The goal is to develop students ability to analyse different assets and financial products as well as select appropriate investments for different investors and market conditions.

Previous knowledge

That included in the above-mentioned required subjects

Prerequisits

Core Finance subjects and general knowledge of financial markets

Teaching methodology

Students will work on teams to prepare the 8 practical case studies. Students devote 2,5 hours per session plus 2 hours preparing each practical case study. There is a written final exam, with open-ended questions which are both practical and theoretical in focus. The exam represents 50% of students final marks. The practical case study assignments represent the remaining 50% of students final marks. Attending class and actively participating are important

Given the variety of topics addressed in this subject (from taxation to financial knowledge of all kinds), the bibliography will include references to specific books and journals for students to be able to explore the concepts they choose in depth. Faculty will provide students with class notes

Activities

Written and/or oral exams

The final exam (consisting of open-ended, theoretical and practical questions) represents 50% of the final grade and is a 90 minutes written exam.

Case study analyses
The practical case studies aim to evaluate how well students are familiar with the financial and fiscal issues addressed, as well as their ability to analyse and make choices in settings which allow for more than one possible option.

Assessment

Tool	Assessment tool	Category	Weight %
Group project	Study Cases	Retake and ordinary round	50.00%
Written and/or oral exams	Final Exam	Retake and ordinary round	50.00%

PROGRAMS

AI26-Exchange Program Bachelor in Business and Artificial Intelligence (Undergraduates: Business)
AI26 Year 1 (Optative)

AI26S-Exchange Program Bachelor in Business and Artificial Intelligence (Undergraduates: Business)
AI26S Year 1 (Optative)

B13-Exchange Program Bachelor of Business Administration (BBA) (Undergraduates: Business)
B13 Year 1 (Optative)

B13S-Exchange Program Bachelor of Business Administration (BBA) (Undergraduates: Business)
B13S Year 1 (Optative)

BBA20-Bachelor of Business Administration (BBA) (Undergraduates: Business)
BBA20 Year 3 (Optative)
BBA20 Year 4 (Optative)

BBA23-Bachelor of Business Administration (BBA) (Undergraduates: Business)
BBA23 Year 4 (Optative)
BBA23 Year 3 (Optative)

BBA25-Bachelor of Business Administration (BBA) (Undergraduates: Business)
BBA25 Year 3 (Optative)
BBA25 Year 1 (Optative)

BBAI26-Bachelor in Business and Artificial Intelligence (Undergraduates: Business)
BBAI26 Year 1 (Mandatory)

DBAI21-Double Degree in Business Administration and Artificial Intelligence for Business (Undergraduates: Business)
DBAI21 Year 4 (Optative)
DBAI21 Year 3 (Optative)

DBAI23-Double Degree in Business Administration and Artificial Intelligence for Business (Undergraduates: Business)
DBAI23 Year 4 (Optative)