



International Consulting Services (ICS)

London (City and Europe) Wellington (Auckland, Christchurch and Pacific Rim)

“Incisive insights deliver performance excellence”

Dynamique is delighted to announce the launch of a new international consulting unit designed for the financial services industry. Our focus is on helping clients identify risk issues inherent within their businesses which may cause them to fail to effectively achieve their business objectives, mission statements and avoid regulatory censure.

How we can help you perform better? Business performance excellence is not just about one aspect of the business. To be effective you have to take a holistic view of the business, client product and service propositions, the industry and regulatory environment and relative peer firm performance.

To deliver business performance excellence investment stakeholders must address:

- ❖ Why are we still business and where are we on the business life cycle?
- ❖ How will geopolitical, macro-economic and regulatory events impact us?
- ❖ Are our products and services still market relevant, exceptional quality providing value?
- ❖ Have we identified emerging threats to business model, margins, competitive positioning and business sustainability?
- ❖ Do our employees still consider our firm a great place to work? Are we managing the emerging risks of job boredom, creating stimulating challenges, demand for CPD, competitive remuneration and healthy working environment?
- ❖ Do we encourage employee engagement in decision making, business planning, management reporting and allocation of the firm’s limited resources?
- ❖ Is our business location and structure optimum? Is funding cost effective? Do we have the lowest cost of capital? Do we have absolute integrity over financial controls, corporate reporting and business ethics?



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External business factors will have an ever increasing impact on many business models. These include interest rates, inflation, regulation and compliance costs, IT spends, corporate governance and Capex to maintain competitiveness and socio-economic upheaval as imbalances are painfully addressed. So what expertise can we bring to the table and help you and your team perform even better?

- ❖ Onus on fund trustees to ensure the fund is using services and managers as cost effectively as possible. When did you last carry out a fee audit and what were the outcomes? How much money did you save and were the service standards still appropriate and suitable for the current and prospective environment?
- ❖ Fund managers need to ensure their non-operational risks are under control and not getting worse. When was the last time to you carried out a full check of your procedures, systems and risk management?
- ❖ For global custodians, clients are demanding better rates on monies (long and short funds), increased use of derivatives in risk management, more accurate unit pricing and underlying marked-to-market prices and increase in securities lending. How rigorous are your checking and audit procedures and processes?
- ❖ For financial advisers, there is a need for across the board review of your business to identify new and emerging risks, suitability and appropriateness of client allocated funds, quality of reporting and clarity and transparency across investment products and supporting services. How does a growth fund or managed fund perform under stressed market conditions?
- ❖ For investment funds, how robust are your internal financial controls such as reconciliations, performance benchmark testing, optimum fund size, fund fees



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Selection of some of our successfully completed consulting projects

Industry	Sub-sector	Client division	Required outcome
Financial services	Fund management	Institutional Portfolio Transition Services	<p>CLIENT REQUIRED OUTCOME: Rebranding of firm triggered a much needed review of the role, duties and services both in-house and external of the portfolio transition desk. A full transition service was provided covering portfolios being transferred in and out, portfolio rebalancing. This required communication with all internal and external stakeholders. A new transition senior manager was to be recruited to head up the transition unit</p> <p>ACHIEVED BY: A full review of all current practices and processes with managers. Identification of current performance and implementation shortfall. Meetings and discussions with fund managers, equity and fixed income dealers, compliance, legal, marketing, performance measurement and outsourced global custodians to manage and recommend improvements to transition process. Uplift of key performance indicators (KPIs) for all outsourced services. Close liaison with key stakeholders such as client directors, institutional clients, pension fund trustees and investment consultants was essential to achieve desired outcome. Liaised with HR and external agencies to interview and recruit senior manager.</p>
Financial services	Fund management	HR: personnel development	<p>CLIENT REQUIRED OUTCOME: To provide investment staff with an e-learning CPD system (including assessment) with a global flavour to expand their knowledge and skillsets to provide enhanced outcomes for investment clients, mitigate business and investment risk – a 10 year project</p> <p>ACHIEVED BY: Research, develop and maintain course design and content origination for a state of the art investment training and knowledge CPD system with domestic and global flavour covering asset management, securities lending, hedge funds, company valuation, client services, collective investments, global custody, performance measurement and attribution analysis ++ (a 10 year project)</p>



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Industry	Sub-sector	Client division	Required outcome
Financial services	Quantitative Fund management	Client Services: Client Money	<p>CLIENT REQUIRED OUTCOME: There had been delays in client monies being immediately applied to appropriate funds leading to clients being disadvantaged and internal audit becoming concerned.</p> <p>ACHIEVED BY: Review client order and money flow to ensure immediate investment in suitable and appropriate funds, that processes were compliant with current regulation and were up to required business and industry best practice. System and process manual to be updated and assigned to staff member for on-going updates to reflect business dynamics.</p>
Financial services	Quantitative fund management	Client Services: Portfolio Transition Management	<p>CLIENT REQUIRED OUTCOME: Weaknesses and shortcomings had been identified with the transitioning in and out of securities, new funds and portfolios. Gaps had appeared in the expected performance of the global custodian as regards KPIs, service standards and quality of currency management.</p> <p>ACHIEVED BY: Walk-thru of current processes with all stakeholders, draft revised process flows, explain and redefine expected service standards with global custodians, IT department, business development directors and quant investment teams.</p>
Financial services	Quantitative fund management	Client Services: Global Custody Relationship Management	<p>CLIENT REQUIRED OUTCOME: A number of external global custodians were being used which was considered efficient, not cost effective and required considerable management time. Many custodial relationships came with new client mandates. The executive committee decided to streamline the number of custodial relationships.</p> <p>ACHIEVED BY: As an ex-senior global custodian manager significant expertise could be brought to bear to test the efficiency of each custodian, the level of fees (transaction, ad valorem, out-of-pocket expenses), cash management and foreign exchange rates, performance of securities lending and client reporting. Using industry information and the standard discretionary average size client portfolio tests were carried out. Recommended relationships and costs by restructuring global custody relationships</p>



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Selection of some of our successfully completed consulting projects (continued)

Industry	Sub-sector	Client division	Required outcome
Financial services	Private HNW banking	Operational Risk	<p>CLIENT REQUIRED OUTCOME: New EU and FSA directive and rules respectively required adherence to investment firm game changing Mifid 1 (Markets in Financial Instruments Directive). Head office required that each unit present to external lawyers evidence that they would be able to meet new standards. It was also required to present a statement outline current gaps and what was being done to bring functional department up-to-speed.</p> <p>ACHIEVED BY: Redraft and edit new rules converting from regulatory speak into a workable control. Interview all line managers, draw-up process flows, match with new requirements highlighting gaps. Timely reviews, workshops, e-broadcasts of progress reports helped to ensure all units stayed on track. It was decided to further extend this exercise to include senior management controls. Achieved a sign-off by external lawyers.</p>
Financial services	Private HNW banking	Operational Risk	<p>CLIENT REQUIRED OUTCOME: The bank was rolling out a new group wide operational risk system. Considerable progress has already been made in making staff aware of the new quality assurance system and what was required. The concept of operational risk was a new discipline to many so staff education and business impact illustrations and outcome workshops were required.</p> <p>ACHIEVED BY: With wider industry experience, advised and supported Risk Management unit (RMU) and bank business units (BBUs) in their preparation and implementation of group wide operational risk management system. Managers required further assistance to identify, assess, and respond to inherent and external risks. A review and walk-thru with BBU managers of their control testing procedures and frequency covering change management, client services, compliance, regulation, data protection, financial crime, legal, product investment, marketing and finance.</p>



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REF	INDUSTRY	WORKSHOP	KEY WORKSHOP BULLETS
CUP	Financial services 	Contemporary unit pricing Time 9am to 12.30pm Includes round robin introductions 1030am Coffee break Course notes and further reading Price NZ\$ 2,750 +GST No out-of-pocket costs if held on client site Additional costs If held at non-client / external venue additional costs relating to Room hire, refreshments (TBC) Attendees collect 2 CPD points	SLIDE 2 0900am: Opening welcome introductions <ul style="list-style-type: none"> ❖ Contemporary and future pricing : client / regulation drivers ❖ Investor firm area V investor area: NZ managed fund relationship ❖ Refresher on unitisation: collective/ pooled benefits ❖ Pricing issues: delivering on best practice ❖ Pricing methodologies ❖ Use of discretion when managing fund ❖ Application of taxation ❖ Managing unit price risk ❖ Quality assurance operational risk ❖ Valuation oversight ❖ Key elements in unit pricing cycle 1025am: Part 1 workshop summary + 5 multiple choice questions 1030hrs: Coffee 15 minutes: restart 1045am <ul style="list-style-type: none"> ❖ Corporate governance: board/committee roles responsibilities ❖ KiwiSaver funds pricing and errors profiles since inception ❖ Where unit pricing often goes wrong ❖ Breaches, errors and material events ❖ Reconciling unit price movements ❖ Criteria for investigating and resolving pricing errors matrix ❖ What constitutes error and what is material? ❖ Regulatory notification of errors and operational relationship ❖ Outcome from unit pricing errors ❖ Correcting ownership errors ❖ Consequences of methodology and “in-force” data ❖ Adjustments for value ownership and minimum checks ❖ Controls, procedure and checks ❖ Investment in external unitised products e.g. fund of funds etc ❖ Ensuring attribution of tax can be reconciled to unit pricing 1215hrs: Workshop review, summary quiz 1230hrs: Workshop close



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REF	INDUSTRY	WORKSHOP	KEY WORKSHOP BULLETS
ETP	Financial services 	Master Class ETFs Time 9am to 12.30pm Includes round robin introductions 1030am Coffee break Course notes and further reading Price NZ\$ 2,750 +GST No out-of-pocket costs if held on client site Additional costs If held at non-client / external venue additional costs relating to Room hire, refreshments (TBC) Attendees collect 2 CPD points	Drivers behind the rise of ETFs and the global ETF time-line ride ETF myth breakers, the exchange traded product family and main asset classes How ETFs are used by institutional, retail investors and wealth management advantages Main global market players and market positioning OPERATIONAL RISK: under the ETF bonnet and choosing suitable and appropriate ETFs Trading ETF units and inherent risk management New markets, product launches and investor product sentiment Next generation Smart beta 2 and top 16 “wish list ETFs” by institutional investors Information clarity and product disclosures Case study : using ETFs to build a low cost, well diversified portfolio



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REF	INDUSTRY	WORKSHOP	KEY WORKSHOP BULLETS
OPR	Financial services/ central bank 	Operational Risk Time 9am to 12.30pm Includes round robin introductions 1030am Coffee break Course notes and further reading Price NZ\$ 2,750 +GST No out-of-pocket costs if held on client site Additional costs If held at non-client / external venue additional costs relating to Room hire, refreshments (TBC) Attendees collect 2 CPD points	09.00hrs to 1030hrs Rationale for running Operational Risk Workshop (NL) <ul style="list-style-type: none"> • Review of RBNZ’s Enterprise Risk Management System and TQM (Risk Team RBNZ) • Overview of operational risk • Capture of key controls • Internal understanding of operational risk 1045hrs to 1115hrs COFFEE <ul style="list-style-type: none"> • Sources of operational risk • The three lines of defence • Implementing an operational risk framework • Global payment and messaging systems e.g. SWIFT • Culture and performance questions • Checking Key Performance Indicators (KPIs) 1115hrs to 1200hrs <ul style="list-style-type: none"> • Key areas of action • Case study learning from operational risk failures (selection) Programme summary and 5 multiple choice questions



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BFLRF	Financial services 	Behavioural finance, liquidity, risk, fund governance Time 9am to 12.30pm Includes round robin introductions 1030am Coffee break Course notes and further reading Price NZ\$ 2,750 +GST No out-of-pocket costs if held on client site Additional costs If held at non-client / external venue additional costs relating to Room hire, refreshments (TBC) Attendees collect 2 CPD points	9.00am: Welcome coffee, meet and greet 9.30am: Programme commences Part 1, 2 and 3 Outlining what is coming up and why these topics were chosen <ul style="list-style-type: none"> • PART 1 : Motivation as the hidden variable of performance • Cognitive flexibility, Creativity, Ownership, Citizenship • Passion without purpose • Motivation from peer performance • Future state of motivation • Behavioural Activation System sensitivity 1030am Coffee break: session restarts at 1045hrs 1045am PART 2: Understanding the new liquidity environment <ul style="list-style-type: none"> • Rationalising the risk • Optimising the portfolio • New rules and new tools • Mapping a new terrain 1130am PART 3: Investment case for better asset owner governance <ul style="list-style-type: none"> • How value is created and destroyed • Valuing better fund governance • Measuring beliefs and governance • Governance rating framework • Investment payoff • Four case studies 1215pm: Revisiting what you have learnt and programme quiz 1230pm: Programme ends



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REF	INDUSTRY	WORKSHOP	KEY WORKSHOP BULLETS
BEX	Financial services 	Best execution Time 9am to 12.30pm Includes round robin introductions 1030am Coffee break Course notes and further reading Price NZ\$ 2,750 +GST No out-of-pocket costs if held on client site Additional costs If held at non-client / external venue additional costs relating to Room hire, refreshments (TBC) Attendees collect 2 CPD points	0900hrs: Welcome coffee <ul style="list-style-type: none"> Defining best execution – no clear definition from regulators and Mr Market Competitive benchmarking verifying quality of best execution Transaction Cost Analysis as part of investment process Direct and indirect explicit and implicit transaction costs Price slippage, transaction cost magnitude and execution methods Benchmark comparison and implementation shortfall Pitfalls and shortcomings in transaction cost management Collection and analysis of pre-trade data, cost and risk estimation Optimisation and efficient frontier Trading performance measurement 1030hrs: Coffee break: session restarts at 1045hrs <ul style="list-style-type: none"> Algorithmic trading – structured and opportunistic but can be expensive High speed trading, reducing the spread expands to non-equity assets of global currencies, bonds New regulatory rules to prevent a market crash as global interconnectivity grows Portfolio trading: cost and speed of execution: choosing trading banks: intra-day volatility: market timing <ul style="list-style-type: none"> Operating trading venues Chi-X Australia, Canada, Japan impacting traditional stock markets Private exchanges those “dark pools” Clients’ deals allocation; firm’s policy for clients instructions pre and post trade execution Managing, avoiding conflicts of interest New rules on payment for order flow, commissions e.g. softing Review of leading three leading international markets’ approach to best execution and what regulatory checks and balances are now expected 1230hrs: Programme summary



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REF	INDUSTRY	WORKSHOP	KEY WORKSHOP BULLETS
WAM	Financial services 	Wealth Asset Management “an industry in rapid transformation” Time 9am to 12.30pm Includes round robin introductions 1030am Coffee break Course notes and further reading Price NZ\$ 2,750 +GST No out-of-pocket costs if held on client site Additional costs If held at non-client / external venue additional costs relating to Room hire, refreshments (TBC) Attendees collect 2 CPD points	0900hrs: Welcome coffee, meet and greet <ul style="list-style-type: none"> Challenges facing the wealth management industry- number one is capital preservation Barbell generational products, generation Y and post-retirement Competition, regulatory compliance, systemic risks Benchmarks questioned over usefulness to investors are under regulatory spotlight Investor relationships, reliance on partners and a new style of distribution Disclosure, transparency, corporate governance and firm wide reputation 1030hrs: Coffee break with session restarting again at 1045hrs <ul style="list-style-type: none"> Manufacturer view: from product push to customised solutions – unique ingredients βeta, smart beta, traditional alpha, systematic alpha and pure alpha the performance box Distribution, relationships with partners, managing the value chain, and fee sharing Client firm dynamics in wealth management Market service client proposition: service correlation between broker/dealers and investment advisors Redesigning operating model, the future outlook plus case studies 1230hrs: Programme summary



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EF	INDUSTRY	WORKSHOP	KEY WORKSHOP BULLETS
NIR	Financial services 	Non-investment risk Time 9am to 12.30pm Includes round robin introductions 1030am Coffee break Course notes and further reading Price NZ\$ 2,750 +GST No out-of-pocket costs if held on client site Additional costs If held at non-client / external venue additional costs relating to Room hire, refreshments (TBC) Attendees collect 2 CPD points	0900hrs: Welcome “What’s coming up in the 1st session. “ Industry complacency is not an option; <ul style="list-style-type: none"> • Articulating clearly to employees and clients exactly how the firm’s business model works and the benefits to those valued clients • The “not-so-obvious” often overlooked: a disaster or scandal leads to firm failure: disbelief follows “how could this have happened to us?” • Your client will ask you “how safe are my assets with your firm?” many front line staff fail to understand critical operational processes • Red flagging risk hot spots in the investment process • Decline in gender balance, an antidote to hubris, concerns institutional investors • Resource risk: over extended managers running too many portfolios: • Knowledge bias risk to fund performance: not “looking over the fence” reliant on legacy knowledge, • Skillset risk: inadequate internal and external continuous training for incumbents and people joining • When information becomes misinformation resulting in mis-selling on complex products • “Ignorance is no excuse for not delivering all round best practice” Choose the right benchmark as the bare minimum and build from there (examples of standards CFA Fund Management Code of Conduct, ASIC best practice, FCA Treating Customers Fairly: FMA Code of Conduct +others) 1030hrs: Coffee break with session restarting again at 1045hrs “What’s coming up in the 2nd session?” <ul style="list-style-type: none"> • Naive reliance on technology, “Do you understand how that algorithm should work?” • Non-existent, incomplete, out of date workflow “swim-lane” diagrams: how often reviewed? • “It’s in the portfolio why can’t I trade it?” Reconciliation gaps create a false sense of security: intra-day and rolling end of day controls • Wealth management is a complex business: your legal counsel may not understand critical operational aspects of the deal “check the fine print” • Poor planning, slow response times due to changes in firm, operating environment • Amalgamated assignments: the improper segregation of duties and parameters of responsibility and accountability: Governance risk events that impacted fund performance plus



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WHO WE ARE: Dynamique was formed in 1997 (UK) and expanded to New Zealand in 2002. The firm brings together a unique fusion of risk management, continuing professional development, business and client service experience improvement reviews for wholesale and institutional clients. Dynamique has presented client customised and open workshops in Auckland, Christchurch, London, Windsor, Ct (US) and Wellington. Visit our website www.dynamique.co.nz for further details



COURSE DIRECTOR: Course director /founder has worked in a range of roles within the financial services and engineering industries from rookie to senior management. and consulting roles in financial services in private banking, asset management, global custody and investment performance systems with Canadian, US and UK institutions. In addition to presenting over 34 workshops for local banks, international banks, stock exchange, presentations included professional development webinars and workshops for trade associations such as NZ IFA, NZ ICA, and LEANZ. Articles authored for professional financial magazines in UK and Australasia. Guy began his career working in investment management for the Queen’s bank, Coutts & Co, London before progressing on to offshore investment management in Guernsey, Channel Islands with N.M. Rothschild and Sons CI. He then moved into the engineering industry to gain some real world experience in financial and HR roles. Returning to the City, Guy joined Royal Trust Corporation of Canada (now part of Royal Bank of Canada group) as financial controller in their global custody division before progressing on to become senior business development manager Canadian /UK institutional clients such as asset managers, endowments, foundations, and broker dealers. During this period Guy had a number of articles published in the widely respected Global Investor magazine on Accounting for Derivatives: a first at that time along with articles on Stock Lending and Cash Management. He also represented the bank on industry development committees such as International Securities Lending Association (ISLA) and at Global Custody s Forums etc.....Guy also ran a number of in-house marketing seminars on financial branding. Remaining in the City, he then moved to Citigroup and joined the fast moving broker/ dealer unit. During his time at Citigroup, Guy ran a number of in-house “nutshell courses” on “Introduction to Derivatives (inc. futures and options) - How they are used in Investment Strategies” co-authoring article on Derivatives Use, Trading and Regulation /Role of the Custodian in Derivatives. Identifying a market need in fund management for technical financial CPD for employees and managers, his company Dynamique won the major sponsorship support of the investment arm of UK’s 2nd largest insurance company to develop advanced content for their CPD e-learning technical investment platform. The crucial point was that the content had to have a global flavour and applicability. This resulted in a 10 year relationship. Since that launch point Dynamique in UK, and more recently in NZ, developed a range of leading edge programs covering front, middle /back office from global investor services to client services, securities lending, asset management and hedge funds. From time-to-time, Dynamique makes submissions and comments to the regulatory authorities on new regulation and provides industry insights on what risks regulators should focus and have on their radar. For sake of clarity Dynamique in UK and NZ work solely with institutional/wholesale banks and investment firms and are not regulated entities in either market as the firm does not manage client assets or give client advice.

Articles published	Workshops presented	Asa guest speaker
Marketing Risk & Risk Mitigating Tools (Journal of Financial Advice, Australasia)	Investment Management Contemporary Unit Pricing GFSG, Wellington, NZ	Global Business Risk 2016 (NZICA) Special Interest Group
So what’s all the fuss about short selling? (Journal of Financial Advice, Australasia)	Non-investment Risk for Fund Management Firms: Wellington	Achieving a Sustainable Income and the True Cost of Investing in Funds (NZIFA)
Role of Custodian in Derivatives (Derivates, Use Trading and Regulation Journal)	Operational Risk for Central Banks (FSG), RBNZ Wellington,	World of Exchange Traded Funds, NZ Institute of Financial Advisers (NZIFA)
International Securities Lending and Cash Management (The Journal UK)	NZ Stock Exchange NZX: Global ETFs/ SmartShares (x 3) master classes	Challenges Facing Boutique Fund Managers and New Zealand’s Primary Industries (NZIFA)
Accounting for Derivatives (Global Investor magazine)	Risk Performance Workshop, BNP Paribas Securities Services, Wellington, NZ	NZ’s State Owned Enterprises “One Down, Two to go and one Drop Out”, (NZIFA)
	Risk Management “The Rules of Engagement”, BNP Paribas SS, Wellington, NZ	Global Risk Challenges, (NZICA)
	NZ IFA Global Regulation and Risk: 12 sessions around NZ	Financial Market Regulation “A Curate’s Egg”, LEANZ
	Delivering Market Leading Investor Services, BNP Paribas SS, Wellington, NZ	
	Investor Services Risk Challenge, BNP Paribas SS, Wellington, NZ	
	Operational Risk, Kiwibank Treasury, Wellington, NZ	
	Operational Risk, BNP Paribas SS, Wellington, NZ	
	Operational Risk, National Nominees, NAB, Auckland, NZ	
	Using Derivatives in Fund Management, Worldinvest, London, UK	
	Export Finance for Senior Managers, Westpac, Auckland, NZ	
	Intro of the Euro: Impact on investment portfolios: SS&C Technologies, US and UK	
	Nutshell Courses (x 5) Introduction to Derivatives, Citibank, London, UK	



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WORKING WITH INDUSTRY LEADERS: Since inception, Dynamique is delighted to have worked with a wide variety of firms within financial services in both UK, US and New Zealand such as AMP Capital Investors, Blackrock, BNP Paribas Securities Services, Insight Investment BONY Mellon, Henderson, Kiwibank, Lloyds Banking Group Private Bank, M&G Investment Management, NAB , Nikko AM, NZX, Reserve Bank of New Zealand, SS&C Technologies, Westpac ,to name but a few.....

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