Rotman Risk Management Association presents

The Fintech Case Competition

Case released via E-mail at 12:00 pm
Kickoff at 5:00pm
Room L1030

E-mail Case submissions by 12:00 pm
Round I, 2:00pm – 5:00pm,
Rooms L1020 & L1025

Final Presentations from 9:00 am – 11:00 am
Networking from 11:00 am – 12:00 pm
At Rotman Career Center – Room 287

February 16  February 23  February 24

Our Panel of Judges

Walid Hejazi, Professor
Rotman School of Management

Andreas Park, Professor
Rotman School of Management

Mohammad Sawwaf
Co-founder & CEO, Manzil
It is a strategy case competition through the lens of a Risk Manager.
The objective is to create two strategies with a detailed recommendation for one of the two participating Fintech companies – PW Portfolio Analytics or Manzil Capital.
Participating Companies will provide an opportunity to interview as they scout for outstanding talent.
The use of public information about the industry is encouraged to strengthen the recommendation.
Teams shall be comprised of 3-4 students with a cost of $20 per team.
Teams will have 12 minutes to present followed by a 5-minute Q&A session.
Maximum number of slides: 10 (2 additional appendix slides for a total of 12) not including title.
Cash prizes: 1st place $500, 2nd place $300, 3rd place $200.
The RRMA and REVCA will judge the elimination round by selecting the top three teams covering each Fintech to proceed to the final round where judges choose the top three winners.
Any questions, please contact RRMA@rotman.toronto.ca.
Presentation Guidelines

1. Introduction & Macro Outlook
   - Discussion about key macroeconomic indicators, trends and how they will positively or negatively affect metrics such as:
     - Rising interest rates, Unemployment rate, Future GDP outlook
   - Any macro-economic risks that pose a threat to the company (risks) such as:
     - Household disposable income, Savings & Investing habits of future customers

2. Industry
   - A complete industry analysis using at least one strategic model
   - Include a brief financial analysis from public information about typical margins such as:
     - ROA, ROE, etc. Is this a profitable industry to be in?

3. Company Analysis
   - What is the company’s secret sauce? (How does it do something better than anyone else?)
   - Evaluate the company’s current choices such as:
     - Mission/Vision, Target Market, Revenue sources, Risks with the company’s current strategy

4. Suggest TWO strategies for the company going forward, (The bulk of the presentation)
   - Mission/Vision
   - How will they get there (capabilities needed)?
     - Operational needs, Management needs
   - What are the future goals? (Profit maximizing? Market share maximizing?)
   - How will they win given industry competition?
   - Market segmentation
     - Who is the customer?
     - Valuing the market - Elaborate on market size, i.e. TAM SAM SOM, List market share assumptions over a horizon
     - Value this market using NPV
       - Make revenue assumptions
       - Use industry cost structures in projections
       - Assume a discount rate (private equity has a premium)
   - Risks and Mitigation of the strategy

5. Final recommendation - Outline ONE strategy the company should pursue and make the case for it