



# Dario Sgrulletti

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| Via Comiziano, 4, 00134, Rome, Italy

## ● **ACADEMIC EXPERIENCE**

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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"

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](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

19/11/2020 - CURRENT - Rome, Italy

**PHD CANDIDATE IN MANAGEMENT - BANKING AND FINANCE**

<https://economia.uniroma2.it/phd/management/banking-finance/>

Ranked first among all candidates

## ● PROFESSIONAL EXPERIENCE

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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 Office**

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 Office**

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

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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  
Score: 110/110 *cum Laude*

2013 - 2016 - Rome, Italy  
**BACHELOR'S DEGREE IN ECONOMICS AND MANAGEMENT – University of Rome "Tor Vergata"**

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## ● HONOURS AND AWARDS

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### Honours and awards

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#### **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>

## ● CONFERENCES AND SEMINARS

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### Seminars

Master of Science in Business Administration

#### **Innovation in Banking and Digital Finance**

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

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More info about the Master: <https://economia.uniroma2.it/commedia>

[https://www.linkedin.com/posts/dario-sgrulletti-4a0470108\\_marketing-marketing-comunicazione-activity-6602615996014448640-kues](https://www.linkedin.com/posts/dario-sgrulletti-4a0470108_marketing-marketing-comunicazione-activity-6602615996014448640-kues)

## ● NETWORKS AND MEMBERSHIPS

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09/10/2021 - CURRENT

#### **Associato corrispondente - ADEIMF**

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

09/10/2021 - CURRENT

#### **Member of the University Committee – CFASI**

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