

**Intellect Oxford School of  
Wholesale Banking  
Senior Executive Program  
Prospectus  
21-23 May 2025**





Banks are transitioning from being mere financial centers to becoming comprehensive solution hubs, with a strong emphasis on making the customer's needs the focal point of their strategy. They are closely monitoring macroeconomic uncertainties while also leveraging artificial intelligence (AI) and other emerging technologies to unlock new pathways for growth and profitability.

The wholesale banking evolution is driven by technological advancements, the changing needs and expectations of customers, and the demand for greater efficiency in terms of speed, accuracy, and timeliness.

A number of emerging trends and innovations are revolutionizing transaction banking, creating significant opportunities for both banks and their clients. An essential key to success is ensuring that Corporate Banking executive teams are equipped with the appropriate competencies through the development phases towards maturity.

## Intellect Oxford School of Wholesale Banking

As the leading provider of banking solutions to several of the world's largest banks, iGTB - Intellect Design Arena has a unique vantage point to spot opportunities and obstacles to operational excellence. As an organization, we are actively engaged in optimizing our client's abilities to compete more effectively in the marketplace, working with them to strengthen their client franchises.

The iGTB Oxford School of Transaction Banking has been held annually in Oxford and culminating at the Oxford and Cambridge Club in London. In 2024, we proudly celebrated the decennial jubilee and over the years, the school has established itself as the world's premier executive program.

Transforming and evolving to empower clients to reach the next level of excellence the school is now "The Intellect Oxford School of Wholesale Banking". The 2025 programme is designed to address the challenges and opportunities in wholesale banking, with a focus on driving innovation, deepening client relationships, and fostering sustainable growth.

The immersive learning experience is designed to help senior banking executives develop a winning strategy and thrive in the complex and fast-moving world of Wholesale Banking.

A unique vantage point to spot opportunities and obstacles to operational excellence

A two and a half day face-to-face immersive learning experience

Designed to help corporate banking executives develop winning strategies

Empowering improved decision making and change management



# LIBRARY

## Insights from Practitioners and Peers

The programme is designed as a highly participatory executive-level learning event. You will hear from seasoned practitioners of Corporate Banking who have achieved important success in major global and regional financial institutions. Their practical insights will be punctuated by peer-to-peer learning exercises, enabling participants to grasp a deep understanding of how other people have addressed many common challenges.

Case studies from global leading banks will be a valuable part of the curriculum. The presentations and follow-on discussions will help to clarify the lessons learned from real-life experiences.

## Programme Leadership

### Rajesh Mehta

Programme Director, Intellect Oxford School of Wholesale Banking, Strategic Advisor, Global Growth Advisory Board, Intellect, Senior Advisor, Boston Consulting Group (BCG), Former Managing Director, Treasury and Trade solutions, Citi

### Dr. Theodore Roosevelt Malloch

Programme Director, Intellect Oxford School of Wholesale Banking, CEO, The Roosevelt Group, Former Research Professor at Yale University, Professor of Strategic Leadership and Governance, Henley Business School, Senior Fellow in Management Practice, Saïd Business School, University of Oxford

### Manish Maakan

School Sponsor, Intellect Oxford School of Wholesale Banking, CEO, iGTB, Intellect Design Arena

### Borna Ljubicic

School Director, Intellect Oxford School of Wholesale Banking, Partner and Chief Growth Officer, iGTB, Intellect Design Arena

## Expert Guests

### Session leaders from previous editions include:

#### Lord Stephen Green

former CEO, HSBC

#### Ashok Vaswani

CEO, Barclays UK

#### Charles McManus

CEO, Starling Bank

#### Lester Owens

Head of Operations, Wells Fargo

#### Suresh Viswanathan

COO, Lloyd TSB

#### Damaso Cebrian

Global CIO, Santander

#### Tracy Black

CEO, Payments Canada

#### Werner Steinmüller

Chairman, Deutsche Bank SPA Italy, Deutsche Bank

#### Andrew Bester

Head of Wholesale Banking, Member of the Management Board, ING

#### Hendra Lembong

CEO, CIMB Group

#### Etienne Bernard

Global Head of Transaction Banking, Credit Agricole, CIB

#### Vivek Ramachandran

General Manager, Head of Global Trade & Receivables Finance, HSBC

#### Naveed Sultan

Former, Chairman, ICG, Citigroup, Professor of Practice at Imperial College Business School

#### Michael Spiegel

Global Head, Transaction Banking, Standard Chartered

#### Rohit Joshi

MD, Head of Global Liquidity and Cash Management, HSBC

#### Richard Jardim

CIO, Canadian Imperial Bank of Commerce

#### Mark Smith

Head of Treasury and Trade Solutions, EMEA, Citi

#### Isaac Thomas

Head of Transaction Banking Group, Kotak Mahindra Bank

#### Ramana Kumar

Head Transaction Banking, National Bank of Abu Dhabi

#### José Luis Calderón

Head of Transaction Banking, Santander Group, Spain

#### Vivek Gupta

President and Head Wholesale Banking Products, Axis Bank

#### Olivier Sfarman

CIO CIB, Société Générale

#### Matthew Fuellhart

Executive Director, Liquidity Management, Corporate & Investment Bank, J.P. Morgan

#### Aiedh Al-Zahrani

Chief Operating Officer, Arab National Bank

#### Peter Hazou

Head of Business Development, Financial Services, Microsoft

#### Sopnendu Mohanty

Chief Fintech Officer, Monetary Authority of Singapore

#### Joydeep Sengupta

Senior Partner, Leader of Asia Pacific Banking Practice, McKinsey & Company

# The New Age of Wholesale Banking: A Comprehensive Agenda of Topics

The course has a series of learning modules that cover specific topics and have defined learning objectives.\*

## 1. THE FUTURE OF WHOLESALE BANKING - STRATEGIC CONTEXT

The evolution of wholesale banking is being driven by several key forces, creating both opportunities and challenges for banks. Understand these forces and explore how banks can approach them and reclaim value. Discover how design-thinking is strategically relevant for success, and get a holistic view on how AI can be an enabler in wholesale banking.

## 2. KEY THEMES IN CORE WHOLESALE BANKING AREAS: MANAGE, MOVE AND MAKE MONEY

Thematic sessions will address evolving shifts in core wholesale banking areas (deposits and liquidity management, payments and receivables, and trade and supply chain finance) and provide actionable insights.

## 3. LEVERAGING SECTORAL AND ECOSYSTEM SPECIFIC SOLUTIONS FOR GROWTH

These sessions emphasize the importance of building wholesale banking solutions for sector-specific ecosystems, with case studies spanning different industries such as e-commerce, energy, manufacturing and government.

## 4. PLAYBOOK FOR WHOLESALE BANKING TRANSFORMATION

2025 will be a year of wholesale banking transformation. Get actionable transformation strategies from the perspectives of a wholesale banking head, a chief information officer, and a transaction banking head. This block will be rounded up with a CIO panel.

“

I'm as proud of many of the things we haven't done as the things we have done. Innovation is saying no to a thousand things.”

~ Steve Jobs



\*Themes will be calibrated and finalized closer to the start of the course





# Oxford & London, Quintessential Learning Environments

“  
The greatest gift that Oxford gives her sons is, I truly believe, a genial irreverence toward learning, and from that irreverence love may spring.

~ Robertson Davies

## Networking, Alumnus & Cultural Programme Further Your Learning

Throughout the course experience, there will be opportunities for you to learn from your peers in a variety of relaxed and enjoyable settings. The evening events will take advantage of the host city's uniqueness. This continues after the course as you join a growing body of school alumni.

### • Pre-course

On Day 1 morning, join your course colleagues in a private guided walking tour of this amazing city that boasts such rich history

### • Day 1

The curriculum of the course begins with registration and lunch, followed by an opening keynote speaker who will share a big-picture view of the future of banking. The afternoon session starts with the formal curriculum and finishes with the first piece of group coursework and will be followed by the opening dinner featuring a well-known speaker who will provide insights on banking business success.

### • Day 2

All-day course with various sessions and activities, including real case studies and further exercises. You will enjoy a private museum tour followed by a private dinner highlighting the host city's best features.

### • Day 3

Concluding sessions will include exercise presentations and will bring all the lessons of the course together in a final action plan. In the evening, you will dine at an exclusive London location and participate in the grand graduation ceremony, and dinner with a formal presentation of graduation certificates and will conclude the programme with an optional stay at the hotel, followed by complimentary breakfast on Saturday morning.

## Reactions from Alumni of the iGTB Oxford course

**Record breaking 100%  
NPS for the Advanced  
Programme**

“  
I found that the group activities were an excellent way of drawing in different experiences. We could tackle a particular problem in perhaps a unique way that not many of us individually would have discovered on our own.

*JD Penner, Senior Director, Cash Management and Payment Solutions, Commercial Solutions, CIBC*

“  
It was a wonderful experience; I learned a lot and met many interesting people.

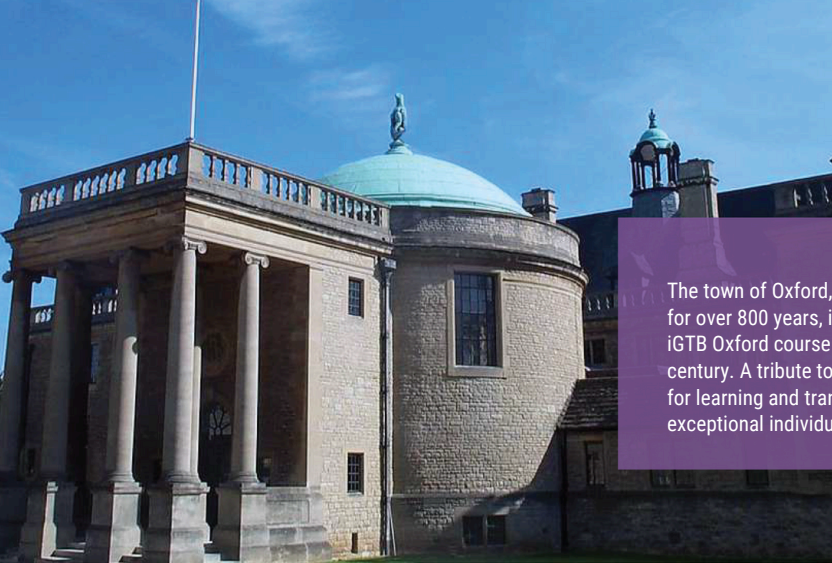
*Henrik Lang, MD, Head of Liquidity, Global Transaction Services, EMEA, Bank of America Merrill Lynch*

“  
Great experience! You've done a great job putting this programme in place, so I strongly recommend it.

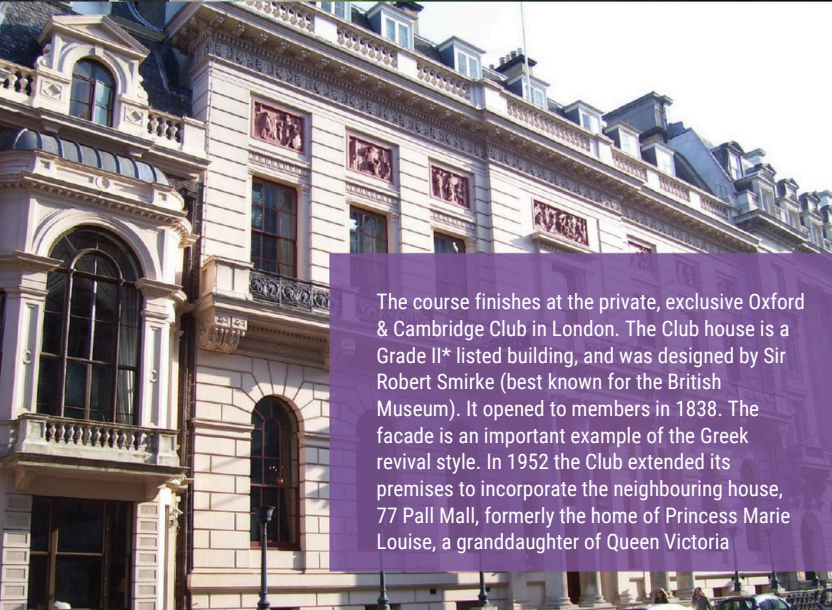
*Patrik Havander, Head of TxB Strategy & Commercial Excellence, Nordea*

“  
It was amazing; it far exceeded my expectations. I got to see some of the world's leaders in transaction banking speak.

*Vipul Lalka, VP Enterprise Payments Platform & Capabilities, TD Bank*



The town of Oxford, which has been the home to the renowned university bearing its name for over 800 years, is the setting for the first two days of the programme. At the heart of the iGTB Oxford course lies Rhodes House, an architectural jewel erected in the early 20th century. A tribute to Cecil Rhodes, the Rhodes scholarships' founder, its legacy as a centre for learning and transformative dialogue continues to inspire and empower generations of exceptional individuals dedicated to making a positive impact on the world.



The course finishes at the private, exclusive Oxford & Cambridge Club in London. The Club house is a Grade II\* listed building, and was designed by Sir Robert Smirke (best known for the British Museum). It opened to members in 1838. The facade is an important example of the Greek revival style. In 1952 the Club extended its premises to incorporate the neighbouring house, 77 Pall Mall, formerly the home of Princess Marie Louise, a granddaughter of Queen Victoria

## Your Exclusive Invitation

This is a by-invitation-only, all-inclusive programme covering course fees, curriculum, course work, guest speakers, all course materials, all meals and transportation between events.

Participants will need to fund their transport to Oxford and from London on Saturday morning after the course, as well as accommodation (at special rates) in the Randolph Hotel in Oxford and the Cavendish Hotel in London.

For more details, see [iGTBOxford.com](http://iGTBOxford.com)

ATTENDEES WILL BE FROM LEADING FINANCIAL INSTITUTIONS FROM AROUND THE GLOBE, PROVIDING AN IMPORTANT INTERNATIONAL PERSPECTIVE TO ALL DISCUSSIONS.

FOR MORE INFORMATION AND TO BOOK YOUR RESERVATION PLEASE CONTACT

[Jenny.McIvor@iGTBOxford.com](mailto:Jenny.McIvor@iGTBOxford.com)



# INTELLECT OXFORD

— SCHOOL OF WHOLESALE BANKING —

[www.iGTBOxford.com](http://www.iGTBOxford.com)