



Name and surname: Katarzyna Perez

Academic title: habilitated PhD

Education	2013 – habilitated doctor of economic sciences in the discipline of finance 2005 – PhD in economics 2001 – Master of Science in Economics
Professional career	since 10.2018 Poznań University of Economics and Business, Institute of Finance, Head of the Department of Investments and Financial Markets (former Department of Monetary Policy and Financial Markets) since 09.2014 Poznań University of Economics, Institute of Finance, Department of Investments and Financial Markets; PUEB associate professor 12.2005-08.2014 Poznań University of Economics, Faculty of Economics, Department of Monetary Theory and Monetary Policy; assistant professor 2001-2003 Bank Societe Generale, Branch in Poznań, Junior Corporate Banking Officer
Function at PUEB	Head of the Department of Investments and Financial Markets (formed after the merger of the Department of Monetary Policy and Financial Markets and the Department of Investments and Capital Markets) CFA Principal Contact at PUEB in connection to the affiliation of programs: Bachelor's in Finance (from 07/2017) and Master's in Quantitative Finance (from 06/2023) Supervisor of SKN Pecunia Moderna
Other functions	Santander TFI, independent member of Supervisory Board and Audit Committee European Finance Association, member European Honours Council, member
Publications	https://scholar.google.com/citations?user=ZhZGn64AAAAJ&hl=pl&oi=ao https://bazawiedzy.ue.poznan.pl
Research topics	https://orcid.org/0000-0003-3331-8456
Subjects taught	Investment funds, Hedge funds, Asset and Wealth Management

Awards, honours and certificates	<p><i>Scientific awards</i></p> <p>Award of the Committee of Financial Sciences of the Polish Academy of Sciences in the 6th Edition of the Competition promoting outstanding scientific achievements in the field of Finance September 18, 2013</p> <p>Honorable Mention for C.H. Beck for the book by K. Perez entitled Hedge funds in the Competition for the best economic publications, Economic Publishing Fair, November 8-9, 2012</p> <p>Scholarship for outstanding young scientists of the Minister of Science and Higher Education, October 2011, scholarship awarded for 3 years</p> <p>Nomination for the 2007 Beta Award for outstanding achievements in the field of financial management for the book entitled: Investment funds. Types, principles of operation, effectiveness, Szczecin, April 2007</p> <p>Scholarship from the Kosciuszko Foundation, Post-doctoral Fellowship category, 2006-2007 edition; New York, USA, April 2006</p> <p>Polish-American Fulbright Commission Scholarship, Junior category, 2004-2005 edition; Warsaw, January 2004</p> <p>Honorable mention in the Scholarships for Young Scientists - Stay with us competition, organized by Polityka magazine, 2003 edition, Warsaw, October 2003</p> <p>Individual award of the Rector of PUEB for original and creative scientific achievements in 2006, 2021, 2022</p> <p>Team award of the Rector of the Poznań University of Economics for scientific achievements in 2003, 2007, 2008, 2009</p> <p><i>Organizational awards</i></p> <p>Team Award of the Rector of the University of Economics for the Team, including Dr. Hab. Katarzyna Perez, prof. emergency UEP for organizational achievements, 2017, 2018.</p>
Research projects	<p>NCBiR, Gospostrateg -VI/0029/2021-00, 02.2022-01.2025</p> <p>Classification and distribution of open-end investment funds using machine learning and robo-advice, research project as part of the project entitled Economics in the face of the New Economy implemented under the Regional Excellence Initiative program (ext. no. at UEP 511071975); 01/06/2019-30/06/2021;</p> <p>KNOWLEDGE – SKILLS – COMPETENCES. An innovative model of acceleration of cross-sectoral cooperation for the development of the Polish capital market, a research and development project co-financed by the Ministry of Science and Higher Education under the DIALOG program, implemented by the Warsaw Stock Exchange Foundation. Participant of two task teams; first author of the study entitled <i>Financial education in the area of the capital market in Poland</i> and co-author of the study entitled <i>Changes in business models on the capital market</i>; (tasks carried out on Feb-May, 2020)</p>

	<p>Attributes of investment funds and their returns, habilitation research project awarded by the Ministry of Science and Higher Education, No. N N113 200737, October, 2009 - October, 2012</p> <p>Determinants of the development of the hedge fund market in Poland, own research project awarded by the Ministry of Science and Higher Education, No. N N112 056734, May, 2008 - February, 2010</p> <p>Mutual fund performance persistence in emerging markets: case of Poland; British-Polish Young Scientists Program financed by the British Council and the Ministry of Science and Higher Education; 2008-2009 edition, stay at the London School of Economics, Financial Markets Group, 07-08.2008</p> <p>Development of the mutual fund market in Poland, research project financed by the Ministry of Science and Higher Education, No. 1 H02C 019 28, April- December, 2005</p>
Key skills	<p>Construction and evaluation of investment portfolios and investment funds</p> <p>Supervision of financial institutions</p> <p>Academic teaching, academic tutoring</p>
Languages	<p>English: fluent in speaking and writing</p> <p>Spanish: advanced in speaking and writing</p> <p>German: basic in speaking and writing</p>
Other information	<p>Certified academic tutor</p>
Links	<p>https://orcid.org/0000-0003-3331-8456</p>
Hobbies	<p>The world of music and words, travelling</p>
Contact	<p>Katarzyna.perez@ue.poznan.pl</p>