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## Helena Luísa de Matos Soares

### Professora Auxiliar Convidada

Department of Social and Enterprise Sciences (ETDA)



### Contacts

<b>E-mail</b>	H.Soares@iscte-iul.pt
<b>Office</b>	D5.12
<b>Telephone</b>	217903936 (Ext: 795121)
<b>Post Box</b>	367

### Curriculum

#### Education

Academic part of Doctorate Program in Corporate Finance

Universidade Complutense de Madrid e Universidade Autónoma de Madrid, Spain

from October 2008 to July 2010. Final Grade Average: 7.5 points in 10

MBA specialized in Finance

UCP - Católica-Lisbon, Lisbon, Portugal

from September 1996 to July 1998. Final Grade Average: 15 points in 20

Degree in Management (electives in Finance)

ISCTE-IUL – Instituto Universitário de Lisboa, Lisbon, Portugal

from October 1986 to July 1991. Final Grade Average: 16 points in 20

Work experience

Since 2001, ISCTE – IUL, Lisbon. Invited Lecturer of Corporate Finance and Markets, in undergraduate, master and post-graduate degrees, namely in courses of Project Evaluation, Capital Budgeting, Financial Analysis, Return and Solvency, Financial Calculation, Capital Markets, Bonds and Shares, Capital Structure and Funding, Finance in Marketing (mostly held in English and with a very strong component of case studying). Co-author in two finance books. Communication, writing and motivating skills and flexibility.

Since 2009, Analyst, as freelancer, of new business projects of Portuguese SMEs in several industries. Capital Budgeting, Project Evaluation. Investment decision maker and financial consultant. Critical thinking skills.

Investor and Manager of own portfolio of financial and real estate assets.

From 2002 to 2009, Founder and managing director of a small business in the tourism and events industry, managing a team of 10 employees. Strong customer relations. Business sold in successful performance momentum. Interpersonal, planning and organizational skills.

From 1991 to 2001, Banco BCP / Banco Mello / Fungest (currently Banco BPI) – Portuguese Investment Banks, Lisbon. Portfolio Manager of Mutual Funds and Pension Funds. Equity analysis, Fixed income analysis, Data analysis, Investment decision, Trading operations, Performance evaluation, Financial Marketing. Analytical, quantitative and forecast skills.

## Academic Qualifications

University/Institution	Type	Degree	Period
Universidade Complutense e U.Autónoma de Madrid	Post-graduation	Parte letiva Doutoramento em Finanças	2010
Universidade Católica Portuguesa	M.Sc.	MBA com especialização em Finanças	1998
ISCTE-IUL - Instituto Superior Ciências Trabalho e da Empresa	Licenciante	Organização e Gestão de Empresas	1991

## External Professional Activities

Period	Employer	Country	Description
1991 - 2001	Investment Banks	Portugal	

## Other Professional Activities

Period	Activity Type	Activity Description	More Info URL
Since 2018	Expert participation in other institutions	Representante de investidores estrangeiros - em processo de visto de residência - desenvolvendo: processos de criação das suas empresas em Portugal, definição da estratégia para as atividades em Portugal e Espanha, avaliação de projetos, relação com entidades e criação da rede de parceiros, fornecedores e potenciais clientes, gestão operacional para o início das atividades.	--

## Teaching Activities

Teaching Year	Sem.	Course Name	Degree(s)	Coord
2025/2026	2º	Financial and Treasury Management	Bachelor Degree in Digital Technologies and Management;	Yes
2025/2026	2º	Financial Analysis and Investments	Bachelor Degree in Digital Technologies and Management;	Yes
2025/2026	1º	Financial Calculus	Bachelor Degree in Finance and Accounting;	Yes
2024/2025	2º	Financial and Treasury Management	Bachelor Degree in Digital Technologies and Management;	Yes
2024/2025	2º	Financial Analysis and Investments	Bachelor Degree in Digital Technologies and Management;	Yes
2024/2025	2º	Financial Modelling		Yes
2024/2025	1º	Financial Calculus	Bachelor Degree in Finance and Accounting;	Yes
2023/2024	2º	Financial Analysis and Investments	Bachelor Degree in Digital Technologies and Management;	Yes
2023/2024	2º	Fundamentals of Finance	Bachelor Degree in Management;	No
2023/2024	1º	Financial Calculus	Bachelor Degree in Finance and Accounting;	Yes
2022/2023	2º	Fundamentals of Finance	Bachelor Degree in Management;	No
2022/2023	2º	Financial Modelling and Business Plan	Bachelor Degree in Finance and Accounting;	No
2022/2023	1º	Financial Calculus	Bachelor Degree in Finance and Accounting;	Yes
2021/2022	2º	Fundamentals of Finance	Bachelor Degree in Management;	No
2021/2022	1º	Financial Calculus	Bachelor Degree in Finance and Accounting;	Yes
2020/2021	2º	Fundamentals of Finance	Bachelor Degree in Management;	No

2020/2021	1º	Financial Calculus	Bachelor Degree in Finance and Accounting;	No
2019/2020	2º	Fundamentals of Finance	Bachelor Degree in Marketing Management; Bachelor Degree in Management;	No
2019/2020	1º	Financial Calculus	Bachelor Degree in Finance and Accounting;	No

## Supervisions

### • M.Sc. Dissertations

#### - Concluded

	Student Name	Title/Topic	Language	Institution	Concluding Year
1	Rui Jorge Guimarães Canas Correia	The (Lack of) Ethics in the Distribution of Financial Products	English	Iscte	2019
2	Débora Soraia Teles Costa	Linkages Between Strategy and Capital Structure in the Portuguese Banking Sector	English	Iscte	2014

### • M.Sc. Final Projects

#### - Concluded

	Student Name	Title/Topic	Language	Institution	Concluding Year
1	Chandi Govan	Market Timing and Selectivity: Evaluating both contributions towards the performance of Portuguese equity funds.	--	Iscte	2011

## Publications

### • Books and Book Chapters

#### - Book author

1	Laureano, L., Soares, H., Mota, A. & Barroso, C. (2024). Introduction to Finance. Lisboa. Edições Sílabo.
2	Laureano, L., Mota, A., Barroso, C. & Soares, H. (2023). Introdução às Finanças. Lisboa. Edições Sílabo.
3	Laureano, L., Soares, H., Mota, A. & Barroso, C. (2021). Introduction to Finance – Fundamentals of Finance with Solved Exercises and Follow-up Exercises . Lisboa. Sílabo.
4	Laureano, L., Mota, A., Barroso, C. & Soares, H. (2020). Introdução às Finanças. Lisboa. Edições Sílabo.
5	Laureano, L., Soares, H., Barroso, C. & Mota, A. (2015). Introduction to Finance. Lisboa - Portugal. Sílabo.

6	Laureano, L., Soares, H., Barroso, C. & Mota, A. (2014). Introduction to Finance. Lisboa. Edições Sílabo.
7	Laureano, L., Soares, H., Barroso, C. & Mota, A. (2014). Introdução às Finanças – Fundamentos de Finanças com Casos Práticos Resolvidos e Propostos. Lisboa. Edições Sílabo.

**- Book editor**

1	Laureano, Raul M. S. & Soares, Helena Matos (2008). Perspectivas do Crédito à Habitação ? 2008. Lisboa/Portugal. Edições Sílabo.
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**- Book chapter**

1	Laureano, Raul M. S. & Soares, Helena Matos (2008). Despertar para as Nuances Envolvidas no Crédito à Habitação. In Laureano, Raul M. S. e Soares, Helena Matos (Ed.), Perspectivas do Crédito à Habitação ? 2008. (pp. 243-266). Lisboa/Portugal: Edições Sílabo.
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## Professional Associations

Ordem dos Economistas (Since 1993)