

CFA UK ANNUAL INVESTMENT CONFERENCE 2026

AGENDA AT A GLANCE

09.06.26

08:45 - 18:30

Convene | 200 Aldersgate | London



CFA SOCIETY
UNITED
KINGDOM

WE
GROW
TALENT

IN PARTNERSHIP WITH



WELCOME

Rising valuations. Evolving technology. Shifting geopolitical sands. In an uncertain world, it's time to see the way forward.

CFA UK's Annual Investment Conference 2026 holds the most important investment topics of today up to the mirror. From keynote speakers, CIO and asset owner panels and four breakout sessions ranging from AI to private markets, we'll show you how the decisions you make reflect on the world around you – so you can see your path forward before the competition can.

PRICING

CFA UK Member	FREE
CFA Institute Member	£140 (60% off)
Non-Member	£350

WHO'S IN THE ROOM

BLACKROCK

ROTHKO

TOBAM

CHURCH OF
ENGLAND

OXFORD
RISK

BETTER SOCIETY
CAPITAL

DEUTSCHE
BANK

ABERDEEN

ROYAL
LONDON

More to be
announced soon!

FIVE REASONS TO JOIN US

1

Understand what the world changing means for your investments in our opening keynote talk on geopolitics - we'll reveal our **world-leading keynote speaker** in the coming weeks!

2

Genuine insight from industry leaders to improve your strategy! You'll hear from CIOs from firms like Tobam, asset owners from firms like Rothko, and more expert speakers across the day.

3

The chance to dive deep into the topics that matter - our breakout sessions cover AI, private markets, fixed income and sustainability to give you the tools to tackle them all with confidence.

4

Grow your contact book and make new connections! Our networking roundtables create conversation to help you meet new friends and colleagues from across the industry.

5

It's free - if you're a CFA UK member, that is! Our members can get all this, as well as access to events and socials throughout the year. You can too: all you have to do is sign up and join us.

BOOK YOUR PLACE

LOOK WHO'S TALKING



ANNA SHIEL
Chief Investment Officer
Better Society Capital



GREG DAVIES
Head of
Behavioural Finance
Oxford Risk



JOY ADAMS
Chief Operating Officer,
Digital Assets Transformation
Deutsche Bank



WILLIAM NICOLL
Chief Investment Officer
**Royal London
Asset Management**



KEYNOTE SPEAKER
World-Leading Expert
on Geopolitics
ANNOUNCED SOON



DAN PHILPS, CFA
Head of Investment
Strategies
Rothko



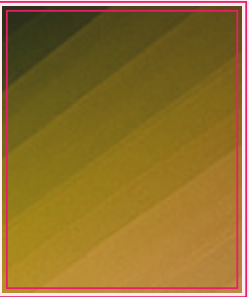
HELEN JEWELL, CFA
International Chief
Investment Officer, Equities
BlackRock



LAURA HILLIS
Managing Director,
Responsible Investing
Church of England



YVES CHOUEIFATY
President, Founder
Tobam



**NEW SPEAKERS
TO BE ANNOUNCED**



DANNY VROEGOP
Chief Executive and
Investment Officer
Colesco Capital



JOE MCDONNELL, CFA
Chief Investment Officer
Border to Coast



SHELLEY MORRISON
Head of Fund Finance
Aberdeen



BEN ASHBY
Moderator
Chief Investment Officer
Henderson Rowe

THE FULL AGENDA

08:30 REGISTRATION
09:10 CHAIR’S WELCOME
09:20 CFA INSTITUTE WELCOME
09:30
KEYNOTE: GEOPOLITICS, DEFENCE & INVESTMENT STRATEGY IN AN AGE OF UNCERTAINTY
WORLD-LEADING KEYNOTE SPEAKER: TO BE ANNOUNCED SOON
10:20
PANEL: THE CIO PLAYBOOK: STRATEGY, RISK AND RESILIENCE IN A SHIFTING INVESTMENT LANDSCAPE In an era of macroeconomic volatility, technological disruption, and evolving investor expectations, CIOs must rethink portfolio strategy, risk management, and long-term resilience. This session explores how CIOs harness diversification, data, sustainability, and culture to navigate uncertainty and drive future success. HELEN JEWELL, CFA , International Chief Investment Officer, Equities, BlackRock YVES CHOUEIFATY , President, Founder, Tobam
11:20 NETWORKING COFFEE BREAK
11:40
PANEL: STEERING CAPITAL IN TURBULENT TIMES: HOW ASSET OWNERS ARE REWRITING THE INVESTMENT FRAMEWORK Asset owners are rethinking portfolio resilience amid inflation, rate shifts, and geopolitical shocks. All while balancing liquidity and long-term goals across public, private, and impact assets. This session explores how AI-driven oversight and evolving ESG standards are shaping governance, risk, and measurable sustainability outcomes. JOE MCDONNELL, CFA , Chief Investment Officer, Border to Coast WILLIAM NICOLL , Chief Investment Officer, Royal London Asset Management
12:20 NETWORKING LUNCH
13:30 NETWORKING ROUNDTABLES

14:00
CHOOSE FROM 4 BREAKOUT SESSION ON TOPICS: EQUITY/ FIXED INCOME AI & DIGITAL ASSETS PRIVATE MARKETS SUSTAINABILITY & IMPACT
14:45
CHOOSE FROM 4 BREAKOUT SESSION ON TOPICS: EQUITY/ FIXED INCOME AI & DIGITAL ASSETS PRIVATE MARKETS SUSTAINABILITY & IMPACT
15:30 NETWORKING COFFEE BREAK
16:00
PLENARY: BEHAVIOURAL FINANCE Despite data being more visible and accessible than ever before, irrationality still appears within the investment landscape. Get genuine insight into navigating the financial world by understanding the behaviour of market participants to build better behaviour than your competition. GREG DAVIES , Head of Behavioural Finance, Oxford Risk
16:45
CLOSING KEYNOTE KEYNOTE SPEAKER TO BE ANNOUNCED SOON
17:30
CLOSING REMARKS
17:35
EVENING DRINKS RECEPTION

BOOK YOUR PLACE

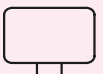
PLAN YOUR BREAKOUT SESSIONS

14:00	14:45
EQUITY	FIXED INCOME
ACTIVE EQUITY IN A WORLD OF PASSIVE DOMINANCE MODERATOR: BEN ASHBY, Chief Investment Officer, Henderson Rowe	FIXED INCOME REINVENTED: RATES, CREDIT & TRANSITION FINANCE MODERATOR: BEN ASHBY, Chief Investment Officer, Henderson Rowe
AI & DIGITAL ASSETS	AI & DIGITAL ASSETS
FROM AI HYPE TO REAL INVESTMENT IMPACT: PRODUCTIVITY, RESEARCH & PORTFOLIO CONSTRUCTION DAN PHILPS, CFA, Head of Investment Strategies, Rothko	DIGITAL ASSETS, TOKENISATION & NEW MARKET INFRASTRUCTURE JOY ADAMS, Chief Operating Officer, Digital Assets Transformation, Deutsche Bank
PRIVATE MARKETS	PRIVATE MARKETS
PRIVATE MARKETS 2.0: ACCESS, PRODUCT DESIGN & CONSOLIDATION SHELLEY MORRISON, Head of Fund Finance, Aberdeen	STRATEGIC INFRASTRUCTURE: INVESTING THROUGH CLIMATE, TECH, DEMOGRAPHIC & GEOPOLITICAL CHANGE SPEAKERS TO BE ANNOUNCED
SUSTAINABILITY & IMPACT	SUSTAINABILITY & IMPACT
NATURE, NET ZERO & THE ESG RECKONING: WHAT'S REAL & WHAT'S NEXT LAURA HILLIS, Managing Director, Responsible Investing, Church of England ANNA SHIEL, Chief Investment Officer, Better Society Capital	PRIVATE MARKETS & SUSTAINABILITY: ALIGNING CREDIT, EQUITY AND CAPITAL OWNERS FOR REAL IMPACT DANNY VROEGOP, Chief Executive and Investment Officer, Colesco Capital

PARTNERSHIP OPPORTUNITIES

Elevate your presence in the investment industry and align your brand with influential investors at the top of their profession. We understand that no two companies have the same needs — that's why we create bespoke packages tailored to your business objectives. Whether you're aiming to boost **brand awareness**, showcase your **thought leadership**, or **generate high-quality leads**, we're here to support you. Our goal is to help you showcase your brand and build valuable new connections. Sponsorship opportunities fall into three main categories:

THOUGHT LEADERSHIP

-  Host a plenary session
-  Panel moderation
-  Host a roundable
-  Host a pre-event webinar
-  Bespoke articles
-  Bespoke podcasts

BRAND AWARENESS

-  Onsite visibility
-  Online visibility
-  Merchandise drops
-  Exhibition stand

NETWORKING

-  Delegate passes
-  Attendee opt-ins
-  Host a drinks reception

WANT TO TAKE PART THIS YEAR?

We'd love to have a chat about your needs, drop us an email to tbaker@cfauk.org to discuss.