

CFA UK ANNUAL INVESTMENT CONFERENCE 2026

AGENDA AT A GLANCE

09.06.26

08:45 - 18:30

Convener | 200 Aldersgate | London



CFA SOCIETY
UNITED
KINGDOM

WE
GROW
TALENT

IN PARTNERSHIP WITH



WELCOME from our CEO

Welcome to the CFA UK Annual Investment Conference 2026. It's a pleasure to gather with you as we explore what it means to invest with confidence in an increasingly complex and uncertain world.

Our aim is simple: to equip you with the insights, connections and perspectives needed to navigate structural change with clarity and purpose.

Thank you for joining us, for contributing your expertise, and for being part of a community committed to raising professional standards and shaping a stronger investment future.

Nick Bartlett - Chief Executive, CFA UK

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
STANHOPE	RAYLIANT	FYVA
NEST INVEST	CITI	SCHRODERS
BAILLIE GIFFORD	TRANSITION DUBAI	MFS INVESTMENT
TANTINE TRUST	ANDROMEDA	AUSTRALIAN SUPER
BORDER TO COAST	CFA INSTITUTE	INDERST ADVISORY
	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

Get 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 speakers across the day.

3

Deep dive into the topics that matter - our break-out 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



ALBERTO GALLO, CFA
Chief Investment Officer and Co-Founder
Andromeda Capital Management



DANNY VROEGOP
Chief Executive and Investment Officer
Colesco Capital



GURNEET SEHMBHI, CFA
Director & Head of Private Equity & Venture Capital Fund Selection
Stanhope Capital



JASON HSU
Founder, Chairman and Chief Investment Officer
Rayliant Global Advisors



JONATHAN MATTHEWS, CFA
Co-Founder and Chief Investment Officer
Fyva



PAUL MOODY
Managing Director, Global Partnerships & Client Solutions
CFA Institute



RACHEL FARRELL
Director of Public and Private Markets
Nest Invest



STEVEN MAJOR
Global Macro Advisor
Transition Dubai



YVES CHOUIEFATY
President, Founder
Tobam



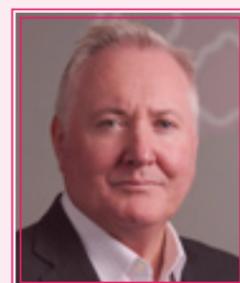
ANNA SHIEL
Chief Investment Officer
Better Society Capital



GEORG INDERST
Independent Advisor
Inderst Advisory



HELEN JEWELL, CFA
International Chief Investment Officer, Equities
BlackRock



JOE MCDONNELL, CFA
Chief Investment Officer
Border to Coast



JOY ADAMS
Chief Operating Officer, Digital Assets Transformation
Deutsche Bank



PILAR GOMEZ-BRAVO, CFA
Co-Chief Investment Officer of Fixed Income
MFS Investment



SHELLEY MORRISON
Head of Fund Finance
Aberdeen



SUE NOFFKE
Head of UK Equities
Schroders



WILLIAM NICOLL
Chief Investment Officer
Royal London Asset Management



CALVIN BAILEY MBE MP
Leyton and Wanstead



GREG DAVIES
Head of Behavioural Finance
Oxford Risk



IAN MCKNIGHT
Chief Investment Officer
Cartwright



JOHN NORMAND, CFA
Head of Investment Strategy
AustralianSuper



LAURA HILLIS
Managing Director, Responsible Investing
Church of England



DR. PRAG SHARMA
Director
Citi Institute's Future of Finance



STEPHEN BEER
Head of Responsible Investment, Strategic Relationships and Integration Strategy
Legal & General Investment Management



TOM COUTTS
Partner
Baillie Gifford



GILLIAN TETT OBE
Keynote Speaker
British Author and Journalist, Columnist, Editorial Board Member
Financial Times

THE FULL AGENDA

08:30 REGISTRATION
09:10 CHAIR'S WELCOME
09:20 CFA INSTITUTE WELCOME Paul Moody, Managing Director, Global Partnerships & Client Solutions, CFA Institute
09:30
OPENING KEYNOTE GILLIAN TETT OBE, British Author and Journalist, Columnist, Editorial Board Member, Financial Times
10:20
LEADERSHIP 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 TOM COUTTS, Partner, Baillie Gifford JASON HSU, Founder, Chairman and Chief Investment Officer, Rayliant Global Advisors
11:20 NETWORKING COFFEE BREAK
11:40
LEADERSHIP 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 JOHN NORMAND, CFA, Head of Investment Strategy, AustralianSuper RACHEL FARRELL, Director of Public and Private Markets, Nest Invest
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 CALVIN BAILEY MBE MP, Leyton and Wanstead
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 SUE NOFFKE , Head of UK Equities, Schroders MODERATOR: BEN ASHBY , Chief Investment Officer, Henderson Rowe	FIXED INCOME REINVENTED: RATES, CREDIT & TRANSITION FINANCE ALBERTO GALLO , CFA, Chief Investment Officer and Co-Founder, Andromeda Capital Management STEVEN MAJOR , Global Macro Advisor, Transition Dubai PILAR GOMEZ-BRAVO , CFA, Co-Chief Investment Officer of Fixed Income, MFS Investment 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 DR. PRAG SHARMA , Director, Citi Institute's Future of Finance JONATHAN MATTHEWS , CFA, Co-Founder and Chief Investment Officer, Fyva NICOLE KOENIGSTEIN , CEO and Co-Chief AI Officer, Quantmate MODERATOR: DAN PHILIPS , CFA, Head of Investment Strategies, Rothko	DIGITAL ASSETS, TOKENISATION & NEW MARKET INFRASTRUCTURE JOY ADAMS , Chief Operating Officer, Digital Assets Transformation, Deutsche Bank IAN MCKNIGHT , Chief Investment Officer, Cartwright
PRIVATE MARKETS	PRIVATE MARKETS
PRIVATE MARKETS 2.0: ACCESS, PRODUCT DESIGN & CONSOLIDATION SHELLEY MORRISON , Head of Fund Finance, Aberdeen GURNEET SEHMBHI , CFA, Director & Head of Private Equity & Venture Capital Fund Selection, Stanhope Capital	STRATEGIC INFRASTRUCTURE: INVESTING THROUGH CLIMATE, TECH, DEMOGRAPHIC & GEOPOLITICAL CHANGE GEORG INDERST , Independent Advisor, Inderst Advisory
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 STEPHEN BEER , Head of Responsible Investment, Strategic Relationships and Integration Strategy, Legal & General Investment Management	PRIVATE MARKETS & SUSTAINABILITY: ALIGNING CREDIT, EQUITY AND CAPITAL OWNERS FOR REAL IMPACT DANNY VROEGOP , Chief Executive and Investment Officer, Colesco Capital JO DALEY , Director, Head of Impact, Clearwater

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.