

CFA UK INVESTMENT TALENT CONFERENCE

5 JUNE 2025
12:00 - 19:30

CFA SOCIETY
UNITED
KINGDOM

WE
GROW
TALENT

12:00-13:00	REGISTRATION & LUNCH		
13:00-13:05	CONFERENCE CHAIR WELCOME Sylvia Solomon, ASIP, Member of the CFA UK Board		
13:05-13:50	OPENING PANEL: FUTURE SKILLS Ahmed Talhaoui, CFA, Managing Director and Head of BlackRock Systematic Group EMEA & APAC Cornelia Andersson, Chief Product Officer, With Intelligence Mikael Homanen, Head of Scientific Research, Innovation and Partnerships, The Upright Project Sonja Laud, Global Chief Investment Officer (CIO), Asset Management Division, Legal & General <i>Moderator: Lindsey Stewart, CFA, Director of Stewardship Research and Policy, Morningstar Sustainability</i>		
14:00-14:30	BREAK OUT SESSION 1		
	AI (CMD Room)	FUTURE TOOLS (ALT/TAB Room)	SUSTAINABILITY (SHIFT Room)
	Using ML/AI to aid in portfolio construction Giulio Renzi Ricci, Head of Asset Allocation, Europe, Vanguard <i>Moderator: Simon Hayley, Senior Lecturer in Finance, Bayes Business School</i>	Leveraging an informational advantage in equity markets Hania Schmidt, CFA, Global Co-Head Client Portfolio Management, Quantative Goldman Sachs <i>Moderator: Momoe Ikeda-Chelminska</i>	How to assess transition plans Paul Drummond, Climate and Environment Research Lead, Redwheel <i>Moderator: Jim Totty, CFA, Managing Director, Viridis Capital</i>
14:40-15:10	BREAK OUT SESSION 2		
	AI (CMD Room)	FUTURE TOOLS (ALT/TAB Room)	SUSTAINABILITY (SHIFT Room)
	AI tools to analyse key equity drivers Kenneth Lamont, Principal, Morningstar <i>Moderator: Ariana Kosyan, CFA, Founder & Advisor, Structify Tax</i>	The balance between skills, knowledge and the use of SLM/LLM Emily Prince, Group Head of Analytics, LSEG <i>Moderator: Elaine Xu, Executive, CAIA UK Chapter & Lead of CFA UK Mentorship Programme</i>	Impact investing analysis - how materials in the plan impact future prospects Catherine Macauley, CFA, Co-Head of Impact Management, Schroders <i>Moderator: Rebecca MacDonald, Managing Director, Head of Investment Management, Better Society Capital</i>

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15:10-15:45	REFRESHMENT BREAK		
15:45-16:15	BREAK OUT SESSION 3		
	AI (CMD Room)	FUTURE TOOLS (ALT/TAB Room)	SUSTAINABILITY (SHIFT Room)
	<p>Are AI companies fairly valued?</p> <p>Dr. Nic Pillow, Senior Ventures Manager, Blackfinch Ventures</p> <p><i>Moderator: Ben Ashby, ASIP, Chief Investment Officer, Henderson Rowe</i></p>	<p>Unlocking value with LLMs in finance</p> <p>Anna-Helena Mihov, Senior Quantative Researcher, DWS</p> <p><i>Moderator: Brian Pisaneschi, CFA, Senior Investment Data Scientist, CFA Institute</i></p>	<p>Applied system thinking</p> <p>Dr. David Neaum, Sustainable Finance Education Manager, Aviva Investors</p> <p><i>Moderator: David Manuel, Chief Investment Officer, Beagle Partners</i></p>
16:25-17:10	<p>CLOSING PANEL: RECRUITERS PANEL</p> <p>In market skills employers are looking for</p> <p>Jignesh Ramji, Chief Talent Officer and Non-Executive Director</p> <p>Emma Penny, Client Director, Financial Services, EMEA, Acre</p> <p>Steve Rush, Executive Director and Global Head of Learning and Skills, MSCI</p> <p><i>Moderator: John Whitfield, Founder, Mentriss Consulting</i></p>		
17:10-17:15	<p>CLOSING REMARKS</p> <p>Nick Bartlett, CEO, CFA UK</p>		
17:15-19:30	<p>DRINKS RECEPTION</p>		

