UNIVERSITY of York

School for Business and Society

SMIF|UK24

GRIFF INVESTMENT FUND

28 - 29 February 2024

THE GUILDHALL, YORK

PLATINUM SUPPORTER

HSBC

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GRIFF INVESTMENT FUND

WELCOME ADDRESS

In 1952, the inception of the first Student-Managed Investment Fund (SMIF) marked a significant milestone in investment education. Today, with over 400 funds globally managing millions of dollars collectively, SMIF has evolved into a powerful force. Traditionally, the SMIF Conference Series has been an annual event in Chicago, fostering collaboration and knowledge exchange. However, it is with great excitement that we have initiated the SMIFUK22 conference in 2022. The aspiration to launch a UK SMIF conference as Europe's first SMIF conference has been a long-time dream, and we feel fortunate to have brought the concept to fruition.

Building on the success of the past two years, we continue the tradition with SMIFUK24 at the historic York Guildhall. Our goal is to provide a space for SMIF members, alums, and investment academics to meet, attend workshops, exchange insights, and network with industry experts. The Stock Pitch and Poster Competitions are designed to educate and engage attendees, offering incentives to support students.

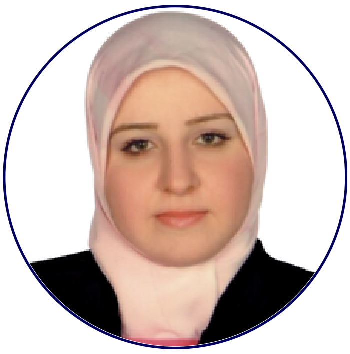
Our aim is to continue attracting funds from around Europe and fostering connections. We envision this conference reaching even more students in the future, providing them with opportunities to connect, learn, share good practices, and support those looking to start their own student funds.

Finally, our sincerest thanks to the School for Business and Society-University of York, HSBC Asset Management, Cazenove Capital, and all involved in making this conference possible.

We hope you enjoy SMIFUK24!

- The SMIFUK24 conference organising committee

ORGANISING COMMITTEE



MARYAM ALHALBONI

Chair of the SMIFUK24 Conference
Academic Member - Griff Investment Fund

GEORGIANA HILLIER

Head of Organising Committee
CBDO - Griff Investment Fund

MONA HOSNY

General Support
CFO - Griff Investment Fund

ANNA HAMES

Speakers and Competitions Coordinator
Analyst - Griff Investment Fund

ELLA BOLTON

Merchandise Coordinator
Analyst - Griff Investment Fund

REECE THOMPSON

Student Funds Coordinator
Analyst - Griff Investment Fund

HENRY SINDEN

Marketing Team
Analyst - Griff Investment Fund

KARINA BISHOP

Grad Panel Coordinator
Analyst - Griff Investment Fund

WHO WE ARE

GRIFF
INVESTMENT FUND

The Griff Investment Fund is the first student-run investment fund in the North of England and one of the first in the UK.

Based at the University of York, we are proud to be entirely student led. The fund grew out of the York Investment Fund, a virtual fund created in Autumn 2011 by York alumni and Griff Investment Fund founders.

The Griff Investment Fund was formed in the summer of 2013 with funds provided by University of York alumni and former Global head of Institutional Business at HSBC Asset Management, Mr Paul Griffiths.

The SMIFUK23 Team and Speakers

The Griff portfolio is a long-only equity investment vehicle, investing in stocks which offer a unique value proposition, with research and sourcing of investment opportunities coming from the analyst body. The fund's target is to generate a rate of return beating the FTSE 350, whilst ensuring analysts have the space to learn and develop their investment knowledge, techniques and individual theses.

The aim of the fund is to promote a general understanding of financial markets, by gaining an appreciation of the opportunities and problems involved in managing an investment portfolio.

All investment decisions are made by analysts - students at the University of York. The Fund was founded on four main pillars:

Education
Promoting an understanding of finance and investment amongst students.

Creating Growth
Working to ensure stable growth of AUM, with a focus on active management supported by macro and micro-economic research.

Opening Doors
Building relationships with industry professionals through guest speakers and networking sessions.

Charity
20% (Up to £100,000) of any profit is allocated to charities of the fund's choice.

AGENDA
DAY ONE

Wednesday 28th February 2024

9:00	Tea, Coffee, and Networking
9:50	Welcome Address - Georgiana Hillier, Griff Investment Fund
10:00	Opportunities in EM Equities - Edward Conroy, HSBC Asset Management
10:30	ESG and Sustainable Investing - Liz Wild and Storm Graham, McInroy & Wood Ltd
11:00	Technology and the Industry - Adam Mingos, BTON Financial
11:30	Tea, Coffee, and Networking with a CV Clinic
12:00	Stock Pitch - Exeter University
12:30	Stock Pitch - University of York
13:00	Lunch with Group Photo
14:00	Trading - Patricia Perlman-Dee, Professor of Finance at Manchester
14:30	Speaker Panel - Chair Prof. Alexander McNeil
15:00	History of Financial Markets - Russel Napier, Author and Investment Researcher
15:00	The Importance of Gender Equity - Tanya Tracey, CEO of GAIN
15:30	Tea, Coffee, and Networking with a CV Clinic
16:00	Thematic Investing - Hugo Thomson, HSBC Asset Management
16:30	Power of Thematic Investments - Weng Lum Khoo, CIO of the Griff Investment Fund
17:00	Heuristics and Biases - Keith Anderson, Chair of the Griff Investment Fund
17:30	Stock Pitch prize, as presented by HSBC Asset Management
17:35	Networking Drinks
19:30	End of Day 1

AGENDA
DAY TWO

Thursday 29th February 2024

09:30	Tea, Coffee, and Networking
10:00	University approaches to climate related investments – Emily Petersen, Cazenove Capital
10:30	Finance Graduate Panel, Chair Emily Petersen
11:00	Tea, Coffee, and Networking with a CV Clinic
11:30	Market Microstructure and Trading – Scott Clark, Griff Alumni; Palantir
12:00	The ethics of economic development – Johnathan Asante
12:30	Fixed Income – William Vaughan, Brandywine Global, part of Franklin Templeton
13:00	Lunch with Group Photo
14:00	Top Trumps' 'Buy/not-buy' – Johnathan Asante
14:30	The 4 Figure Trick – David Meckin, Insight Financial Consulting
15:30	Tea, Coffee, and Networking with a CV Clinic
16:00	Non-Finance Graduate Panel, Chair Fabien Baugard
16:30	Poster Competition prizes, as presented by Cazenove Capital
16:35	Closing address
17:00	End of conference

SPEAKER BIOS

EDWARD CONROY
PORTOFLIO MANAGER - GLOBAL EMERGING MARKETS, HSBC ASSET MANAGEMENT

Edward Conroy is a portfolio manager in the Global Emerging Markets Equity team within HSBC Asset Management in London and has been working in the financial industry since 2004. He is responsible for investment process management, research in Emerging market equities and management of the Brazil equity portfolios. Prior to joining HSBC as an analyst in 2008, Edward worked as part of the Global Emerging Markets Equities team at Aberdeen Asset Management. Ed holds a master's degree in biochemistry from Oxford University (UK) has achieved the CFA Institute Certificate in ESG investing and is a CFA charterholder.

LIZ WILD
INVESTMENT MANAGER - MCINROY & WOOD

Liz Wild is an Investment Manager and Board Director of McInroy & Wood. Liz is based in the firm's Harrogate office. She is a member of the Investment Team involved in research and analysis of companies, and responsible for managing segregated portfolios for a range of clients. Liz returned to McInroy & Wood in 2016, having previously spent four years with the firm at its Haddington office earlier in her career. Liz graduated in Biology from Manchester University in 1998 and started her career in London. She has a particular interest in smaller companies, the Environmental, Social and Governance (ESG) aspects of investing. Liz is a Chartered Fellow of the Chartered Institute for Securities and Investment.

STORM GRAHAM
INVESTMENT ANALYST - MCINROY & WOOD

Storm Graham is an investment analyst at McInroy & Wood and is based in the firm's Haddington office. She is a member of the Investment Team and is involved in the research and analysis of existing holdings and potential investment ideas. Storm graduated in Economics from the University of Edinburgh in 2021 and was a member of the University's Trading and Investment Club.

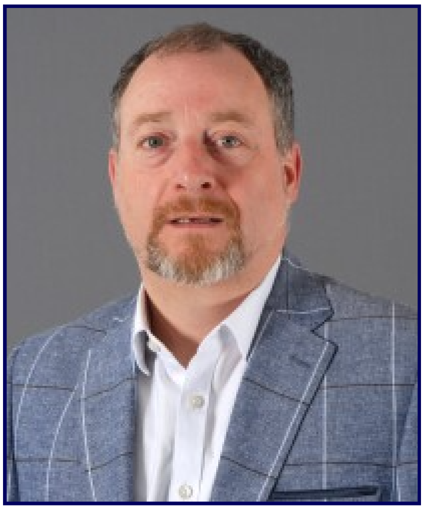
SPEAKER BIOS

ADAM MINGOS
CAPITAL MARKETS AND FINTECH – BTON FINANCIAL

Adam has held senior trading positions at 4 major global financial institutions in both investment banking and asset management, engaging with governments and financial institutions to manage complex risk and improve trading processes. Adam is a passionate scientist at heart, returning to university at Cambridge to take postgraduate sutdies in managament. He is currently active in areas of capital markets AI, no code engineering and online payments.

PATRICIA PERLAMN-DEE
PROFESSOR IN FINANCE – AMBS

Patricia, a Finance Professor at AMBS, holds a Master's in Finance, is a CFA charter holder, PGCE, and a qualified Executive Coach. Patricia brings extensive experience from the finance sector, having worked with major corporations, including Citigroup, JP Morgan, Nomura, and Barclays, in Manchester, London, and New York. Patricia collaborates with a diverse clientele and financial institutions. Patricia has received numerous teaching accolades, demonstrating her commitment. She is an experienced presenter at national and international conferences, contributing to charitable causes and raising over £500,000.



ALEXANDER MCNEIL
PROFESSOR IN ACTURIAL SCIENCES – SBS YORK

Professor Alexander McNeil, an expert in quantitative financial risk management. His research interests lie in the development of quantitative methodology for financial risk management and include models for market, credit and insurance risks, financial time series analysis, models for extreme risks and correlated risks and enterprise-wide models for solvency and capital adequacy. He's authored a leading textbook, presented at risk management conferences, and holds esteemed positions in actuarial societies.

SPEAKER BIOS

RUSSEL NAPIER
AUTHOR AND INVESTMENT RESEARCHER

Professor Russell Napier has been an advisor to investment institutions on asset allocation for almost thirty years. Twenty years ago he launched the Practical History of Financial Markets course at The Edinburgh Business School and the course now runs on campus, online and in an intense two and a half day executive education format. Russell is the author of two books on financial history- Anatomy Of The Bear: Lessons From Wall Street's Four Great Bottoms and The Asian Financial Crisis 1995-98: Birth Of The Age of Debt. In 2014 Russell opened a new public business and financial history library in Edinburgh called The Library of Mistakes.

TANYA TRACEY
CEO - GAIN

Tanya is the CEO at GAIN following a career in investment banking, investor relations and running a diversity and inclusion programme. She is passionate about increasing the number of women in investment management and is a member of the CFA UK Inclusion & Diversity Network committee.

HUGO THOMPSON
INVESTMENT SPECIALIST - HSBC ASSET MANAGEMENT

Hugo Thompson is an Investment Specialist in the UK Multi-Asset team within HSBC Asset Management in London and has been working in the financial industry since 2016 after joining HSBC's Global Graduate Scheme. He currently focuses on providing investment solutions for the UK Wholesale client segment including low cost, core and sustainable solutions. Hugo is a CFA Charter Holder and holds a BA Politics Philosophy and Economics from The University of York (UK).

SPEAKER BIOS

WENG LUM
CIO – GRIFF INVESTMENT FUND

Weng is a final year BSc Economics and Finance student and the Chief Investment Officer of The Griff Investment Fund. He interned at Jefferies' Equity Research division with rotations in the Internet and Leisure teams and will be returning to Jefferies after graduation. Prior to his CIO position, he was the sector head of Healthcare for Griff and Vice President of the Association of Malaysian Economics Undergraduates (AMEU) UK.

KEITH ANDERSON
CHAIRMAN OF THE GRIFF INVESTMENT FUND

Prior to entering academia, Keith held a position as a systems developer for several years, including a stint at Deutsche Bank in Frankfurt. His research during his Finance PhD at the ICMA Centre, Reading University, focused on demonstrating the potential for improved investor returns through alternative Price-Earnings ratio calculations. At the University of York, he chaired the Griff Investment Fund, one of the UK's longest-standing real-money student-managed investment funds, and actively organises SMIFUK, the only SMIF conference outside the United States.

EMILY PETERSEN
PORTFOLIO DIRECTOR – CAZENOVE CAPITAL

Emily Petersen joined Cazenove Capital in 2010 after graduating from Trinity College Dublin with a degree in Economics and Philosophy. Emily has completed the Chartered Institute of Securities and Investment diploma and the Sustainable Finance course with the Cambridge Institute of Sustainability Leadership. She is a Portfolio Director, responsible for managing investment portfolios for charities, endowments and Universities. Emily is also a trustee of a homelessness charity, currently exploring impact investment to expand their operations.

SPEAKER BIOS

SCOTT CLARK
FORWARD DEPLOYED ENGINEER - PALANTIR

Scott is an alumni of The Griff Investment Fund now working at Palantir Technologies, where his team operates at the cutting edge of generative AI and specialises in large-scale data science projects for Fortune 100 clients in the United States. Scott's academic background is focused on the application of modern machine learning to portfolio optimisation, quantitative finance, and algorithmic trading, having taken second place in the Southeastern Hedge Fund competition 2023 in Atlanta.

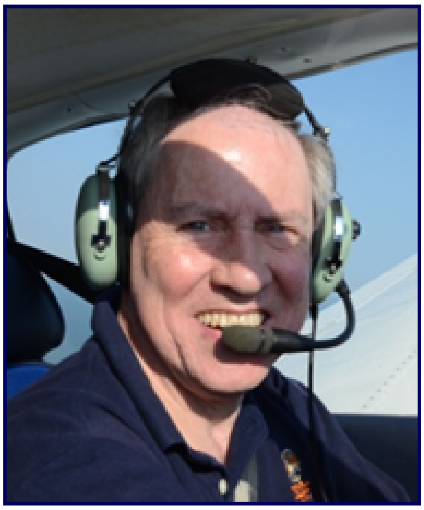
JOHNATHAN ASANTE
COFOUNDER AND CHAIR - FOOTPRINTS AFRICA

Johnathan Asante is cofounder and Chair of the Footprint Africa charity based in Ghana, which offers resources to small African business in areas which affect environmental and social outcomes. Studying economics at the LSE, he explored the connections between economic development and globalisation, while teaching undergraduate classes in Economics and Econometrics. His main interests are the convergence of theology and science, the linked issue of transpersonal psychotherapy and the role of stock market investment for long term economic development.

WILLIAM VAUGHAN
ASSOCIATE PORTFOLIO MANAGER - BRANDYWINE GLOBAL PART OF FRANKLIN TEMPLETON

Associate Portfolio Manager & Senior Research Analyst, William is an associate portfolio manager and research analyst on the Global Fixed Income team. He joined the firm in June 2015 and is based out of the office of Franklin Templeton Investment Management Limited in London. Previously, he was a European high yield analyst with Crédit Agricole Corporate & Investment Bank in London (2013-2015). He earned his M.Sc. in Carbon Management and Economics from the University of Edinburgh Business School and his B.Sc. in Environmental Geoscience from Durham University.

SPEAKER BIOS



DAVID MECKIN
MANAGING DIRECTOR – INSIGHT FINANCIAL CONSULTING

David previously held senior management positions up to and including that of Chief Financial Officer of a multi-national business, working with companies around the world. David regularly delivers management workshops and presents at conferences, both in the United Kingdom and abroad. He also coaches senior executives in a variety of organisations and is regularly called upon to assess the business and financial acumen of prospective CEOs around the globe. Clients, past and present, include numerous FTSE 100 companies, along with many leading international brands.

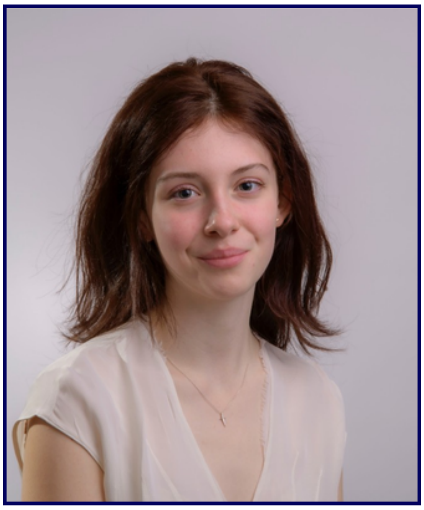
FABIEN BAUGARD
CAREERS CONSULTANT – SBS YORK

Fabien is the Careers Consultant within the School for Business and Society , University of York. He has been supporting the SMIFUK conference since its creation in 2022. During the conference, Fabine offers CV clinics and lead on alumni events. In the latter, former students of the University of York, now established professionals, discussed the practical aspect of investment banking as well as their career path, a great way to get useful insights in future careers.

MARYAM ALHALBONI
CHAIR OF THE SMIFUK24 CONFERENCE

Maryam is a lecturer in Finance at the University of York, Chair of the SMIFUK 2024 Conference, and a permanent member of Griff Investment Fund. With a background as a financial services practitioner, she has experience in different financial products and seamlessly bridges academia and industry experience. Her research focuses on market microstructure and delves into high-frequency trading, market liquidity, trading behaviour, and market dynamics. Maryam actively disseminates her research findings, contributing to international meetings, engaging with market regulators, presenting at international conferences, and delivering insights at external seminars.

SPEAKER BIOS



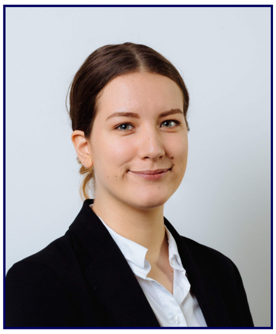
GEORGIANA HILLIER
CBDO – GRIFF INVESTMENT FUND

Georgiana Hillier is the Chief Business Development Officer for the Griff Investment Fund. She is a second year Environment, Economics and Ecology student. During her time at the Griff Investment Fund, she competed in the Southeastern Hedge Fund competition where her team came second place in the international competition.

GRAD PANELS

FINANCE

JAMES CAVEN
INVESTMENT ANALYST



ESZTER BALLAI
ASSOCIATE

NOAH RILEY
PRIVATE EQUITY COVERAGE

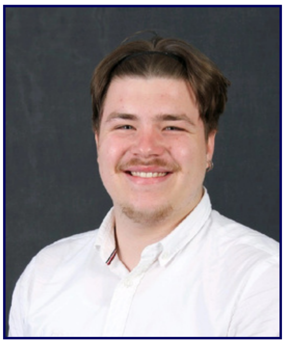
RICHARD LAVERICK-BROWN
TRADING ANALYST

MAX TRUELOVE
ASSOCIATE

NON-FINANCE

FAZ KAZMI
LAUNCH MANAGER

ABIGAIL CRISSWELL
COMPETITION ECONOMIST



HUBERT SOLECKI
CYBER SECURITY

SCOTT CLARK
ENGINEER

CORPORATE SUPPORTERS

HSBC ASSET MANAGEMENT

HSBC Asset Management is a major global asset management firm managing assets totalling USD662 billion as at 30 September 2023, with well-established businesses in Europe, Asia-Pacific, Americas and the Middle East. We are the asset management division of, and wholly-owned by HSBC Holdings plc (HSBC Group), one of the largest financial services organisations in the world.

Our investment capabilities span across different asset classes - equities, fixed income, multi-asset, alternatives and liquidity. HSBC Asset Management is well placed to provide a globally-consistent, disciplined investment process across our capabilities, drawing on the local knowledge and extensive expertise of our teams around the world.

CAZENOVE CAPITAL

Cazenove Capital are the wealth management and charity investment arm of the Schroders Group. They are the largest manager of charitable assets in the UK, with over £10 billion assets under management on behalf of over 1,000 charities, foundations and Universities.

The team's flagship Responsible Multi-Asset Fund is the fastest growing charitable fund over the past 5 years and targets a total return of CPI+4% as well as a positive impact on people and the planet.

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GRIFF INVESTMENT FUND

CONTACT US

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