SMIFUK25 CONFERENCE

UNIVERSITY of York

GRIFF INVESTMENT FUND

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WELCOME ADDRESS -SMIFUK25

It is our great pleasure to welcome you to SMIFUK25 at the historic York Guildhall. We are delighted to have you join us for this exciting event, which continues to grow in reach and impact each year.

The first Student-Managed Investment Fund (SMIF) was established in 1952, marking a significant milestone in investment education. Today, with approximately 350 funds globally, the sharing of practical knowledge among students has grown remarkably. The SMIF Conference series began in Chicago to foster cooperation and provide students with hands-on investment experience.

We launched our own SMIF Conference in 2022 to provide networking opportunities and facilitate learning from industry professionals. Since then, it has expanded each year, reaching a growing audience. We are thrilled to build on this success by hosting SMIFUK25.

Our goal is to provide a platform for SMIF members, alumni, and investment academics to meet, exchange insights, and network with industry experts. We are excited about the Stock Pitch and Poster Competitions, designed to educate and engage attendees while offering valuable incentives to support students.

This conference aims to foster connections, whether between different SMIFs or by facilitating conversations between students and industry professionals. We hope to see SMIFUK25 continue to grow, reaching more students and offering opportunities to connect, learn, and share good practices.

We express our sincerest thanks to the University of York, HSBC Asset Management, CISI, CAIA, Cazenove Capital, York Angels, and everyone who helped make this conference possible.

Once again, welcome to SMIFUK25—we hope you enjoy the event!

- The SMIFUK25 Conference Organising Committee

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SMIFUK25-COMMITTEE

Maryam Alhaboni
Chair of the SMIFUK 2025 conference
Permanent member -GRIFF Investment Fund

Elle-Rose Waters
Head of Organising Committee
Senior Tacticals and Thematicals Analyst - Griff Investment Fund

George Austin
Financials & Real Estate Analyst - Griff Investment Fund

Rosabelle Biju
Sector Head of Financials & Real Estate - Griff Investment Fund

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SMIFUK25-COMMITTEE

Stephanie Grant

Senior Materials & Industrials Analyst - Griff Investment Fund

Jack Campbell

Healthcare Analyst - Griff Investment Fund

Conan Trindade Steel

Green Technology & Related Systems Analyst - Griff Investment Fund

Keith Anderson

Chairman of the Griff Investment Fund

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AGENDA: DAY ONE

09:00-09:30	Registration, Tea & Coffee
09:30-09:40	Maryam Alhalboni-Chair of the SMIFUK 2025 conference *Welcome Address*
09:40-10:10	Edward Conroy-Portfolio Manager - HSBC Asset Management *Keynote Speaker*
10:10-10:40	Samuel Hields-Co-founder of York Angels *Presentation: Life As A Venture Capital*
10:40-11:10	Patricia Perlman-Dee- Professor of Finance-University of Manchester *Presentation: Making Those $$$$$*
11:10-11:30	Networking, Tea & Coffee, CV Clinic
11:30-13:00	Stock Pitches Competition
13:00-13:30	Rebecca Harvey -Investment Analyst (Alternatives) at Border to Coast Pension Partnership & Phil Clements - Asset Owner Index Manager (UK&I and Switzerland) @ Bloomberg *Presentation: Alternative Investments For UK Asset Owners*
13:30-14:15	Lunch & Group Photo
14:15-14:45	David Meckin-Managing Director of Insight Financial Consulting Ltd *Presentation: A Lifetime Of Investing – Lessons Learned*
14:45-15:15	Clare Wood-Portfolio Specialist at Stewart Investors *Presentation*: *It's All About The People – The Importance Of Stewardship In Company Selection*
15:15-15:35	Networking, Tea & Coffee, CV Clinic
15:35-16:15	Panel Discussion-Chair Prof. Alexander McNeil
16:15-16:45	Russell Napier-Author and investment researcher *Presentation*: *Ten Lessons From Financial History For The Way We Live Now*
16:45-16:55	Stock Pitch Prize, presented by HSBC
16:55-17:00	End of Day One
17:00-19:00	Networking Drinks at Merchant Adventurers' Hall

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AGENDA: DAY TWO

09:30-10:00	Networking, Tea & Coffee
10:00-10:30	Emily Petersen - Portfolio Director & Tom Holbrook - Portfolio Manager - Cazenove Capital *Presentation: Sustainable Investing: Navigating Risks And Unlocking Opportunities*
10:30-11:00	Andrew Milligan-Investment consultant & adviser - Independent Economist - Charity trustee - Writer and speaker *Presentation: Investment Processes, Problems, Pitfalls And Practicalities*
11:00-11:30	Andrea Griffin - Global Head of Responsible Investment Specialists - HSBC Asset Management *Presentation: Investing With A Sustainability Lens – Key Considerations And Market Developments In 2025 And Beyond*
11:30-12:00	Networking, Tea & Coffee, CV Clinic
12:00-12:30	Greg von Schultzendorff -Executive Director, Alternative Credit at JP Morgan *Presentation: Alternative Credit And Spread Markets*
12:30-13:15	Graduate Panel- Chair Fabien Baugard
13:15-14:00	Lunch & Group Photo
14:00-14:30	James Caven-Investment Analyst at Warwick Capital Partners Presentation: *How To Beat The S&P Via Opportunistic Real Estate Investing*
14:30-15:00	Hannah Daniel-Investment Manager- *LGT Wealth Management* *Presentation: The Wealth Management Pathway*
15:00-15:25	Networking, Tea & Coffee
15:25-16:45	Student Investment Managed Funds Showcase
16:45-16:50	Poster Competition Prize
16:50-17:00	Closing address

SPEAKERS' BIOS IN PRESENTATION ORDER

Edward Conroy - Portfolio Manager - Global Emerging Markets, HSBC Asset Management

Edward Conroy is a portfolio manager in the Global Emerging Markets Equity team within HSBC Asset Management London and has worked 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 Market Equities team at Aberdeen Asset Management. Ed has achieved the CFA Institute Certificate in ESG investing and is a CFA charter holder.

Samuel Hields - Co-Founder of York Angels

Samuel Hields is based out of OpenOcean's London office and has a background working in software development and operations. Having studied Computer Science, he started his career at JPMorgan working on the world's first real-time liquidity monitoring and flow control system which automatically managed in excess of USD 6 trillion in cash flows per day. He also spent some time in JPMorgan's Cyber Defence team focusing on application security.

Patricia Perlman-Dee - Professor of Finance

Patricia Perlman-Dee, CFA, is a Professor in Finance at the University of Manchester. She has a master's in finance, and a PGCE and is the Academic Director of Custom Programs at AMBS. Patricia has extensive experience working in large financial corporations such as Citigroup, JP Morgan, Nomura, and Barclays in Manchester, London, and New York. Patricia has created and teaches a range of courses across Undergraduate, Postgraduate, MBA, and Executive Education. Every year 2019-2024, Patricia has been awarded (and highly commended) the Faculty of Humanities AMBS Outstanding Teaching Award.

Rebecca Harvey - Investment Analyst (Alternatives) at Border to Coast Pension

Rebecca is an Investment Analyst specialising in alternatives at Border to Coast Pension Partnership, the largest asset manager outside of London and Edinburgh, managing approximately £64 billion on behalf of 11 local authority partner funds. In her role, Rebecca is responsible for analysing and monitoring existing funds and private market assets, as well as recommending new managers for Border to Coast's private equity, private credit, infrastructure, climate opportunities, and UK opportunities funds. She was among the first cohort of GAIN (Girls are Investors) interns in 2021 and received the GAIN Alumni of the Year Award.

Phil Clements - Asset Owner Index Manager (UK&I and Switzerland) at Bloomberg

Phil is responsible for managing Bloomberg's asset owner and investment consultant index relations across the UK, Ireland, and Switzerland. He joined Bloomberg in 2023 as the first member of the firm's asset owner index team - helping clients design and select strategic policy benchmarks across fixed income, commodities, equities, currencies, and digital assets. Before Bloomberg, Phil was an Associate Director at Record Financial Groups in New York where he covered a number of the firm's products and services including, global macro strategies, supply chain finance, and FX risk management products.

David Meckin - Managing Director of Insight Financial Consulting Ltd

David Meckin is the founder and Managing Director of Insight Financial Consulting. Previously, he held several senior management positions, including that of chief financial officer of a multinational business, working with companies in the United Kingdom, Europe, North America, and Asia. He coaches senior executives in a wide variety of organisations and is regularly called upon to assess the business and financial acumen of prospective CEOs. Clients, past and present, include numerous FTSE 100 and FTSE 250 companies, along with many leading international brands.

Clare Wood - Portfolio Specialist at Stewart Investors

Clare Wood joined the Stewart Investors team in March 2023 as a portfolio specialist. Previously, Clare worked in several roles at First Sentier Investors including Head of Investment Assurance and Global Head of Product and prior to that worked in investment risk, investment analysis, and portfolio management. Clare holds a First Class Honours degree in Pure and Applied Mathematics and a PhD in Automatic Control and Systems Engineering with a focus on machine learning from the University of Sheffield. She has lived and worked in Bermuda and Edinburgh and now lives in London.

Russell Napier - Author and Investment researcher

Russell Napier is the author of The Solid Ground investment report for institutional investors and co-founder of the investment research portal ERIC. He has worked in the investment business for 35 years and has been advising global institutional investors on asset allocation since 1995. Russell is the author of the book Anatomy of The Bear: Lessons From Wall Street's Four Great Bottoms and is the founder and course director of The Practical History of Financial Markets course. He serves on the investment advisory committees of three fund management firms: Cerno Capital, Kennox Asset Management, and Bay Capital.

Emily Petersen - Portfolio Director- Cazenove Capital

Emily Petersen is a Portfolio Director, responsible for managing sustainable investment portfolios for Families, Universities, and Charities. She is one of the firm's sustainability leads, a member of the Cazenove Capital Impact Committee, and was a 2022 Women in Investment Awards Finalist. She has completed the Cambridge Institute for Sustainability Leadership Sustainable Finance course and the Chartered Institute of Securities and Investment Diploma. Emily is a trustee of a homelessness charity in East London.

Tom Holbrook - Portfolio Manager- Cazenove Capital

Tom Holbrook is a Portfolio Manager at Cazenove Capital. He joined the firm in 2024 but has a decade of experience in the investment industry, having previously worked as an Investment Director on the Charities Team at Investec. Tom has a post-graduate certificate in sustainable business from the Institute for Sustainable Leadership (University of Cambridge) and a CFA certificate in both climate investing and ESG investment. He is a member of the Cazenove Capital Impact Committee.

Andrew Milligan - Investment consultant & Independent Economist - Charity trustee - Writer and speaker

Andrew Milligan was Head of Global Strategy at Standard Life Investments/Aberdeen Standard Investments from 2000-20, researching all the major economies and financial markets to form the House View guiding portfolio construction, and tactical and strategic asset allocation. Since retiring from full-time employment in 2020, he has assisted many organisations, as an investment and pension fund consultant, an economic and financial adviser, a N.E.D., and a charity trustee.

Andrea Griffin - Global Head of Responsible Investment Specialists

Andrea Griffin leads HSBC's AM Responsible Investment Specialist team. She heads a global team focused on developing the firm's ESG and Sustainability frameworks and solutions, aiming to achieve diverse sustainability objectives, meet regulatory requirements, and enhance client engagement. Andrea has published several pieces through HSBC's Centre of Sustainable Finance on the transition for hard-to-abate sectors and climate-critical technologies.

Greg von Schultzendorff - Executive Director-Alternative Credit -JP Morgan

Greg runs Alternative Credit Distribution for J.P. Morgan globally and has been working in the J.P. Morgan Credit Markets business since 2016. Based in London, he is responsible for Alternative Credit investor coverage, with the rest of the team spread across New York and Paris. Prior to joining J.P. Morgan as an Associate in 2016, Greg started his career as a Hedge Fund Sales Analyst at Morgan Stanley in 2013. Greg holds a bachelor's degree in history and politics from the University of York and is also a CFA charter holder.

James Caven - Investment Analyst- Warwick Capital Partners

James Caven is an Investment Professional at Warwick Capital Partners a global special situations fund where he focuses on European debt and equity opportunities. Before joining Warwick, he was an associate at SCP where he focused on European Private Equity. He started his career at Lazard in Restructuring and M&A. James holds a BA in Philosophy, Politics & Economics from the University of York where he attended from 2015 to 2018. Whilst there he spent 3 years within the Griff Investment Fund including as CIO.

Hannah Daniel-Investment Manager - LGT Wealth Management

Hannah joined LGT following the acquisition of abrdn's discretionary investment management business in 2023. Hannah has over eight years of experience in financial services, joining abrdn from RBC Brewin Dolphin in 2021. In LGT's Leeds office, she manages portfolios for private clients, companies, pensions, and trusts. Hannah has undertaken her Diploma in Wealth Management, is a Chartered Member of the Chartered Institute for Securities and Investment (CISI) and sits as President on the Yorkshire Branch Committee, whilst also holding the CFA certificate in ESG investing.

Maryam Alhalboni- Chair of the SMIFUK 2025 conference

Maryam is a Lecturer in Finance at the University of York, Chair of the SMIFUK 2024 and SMIFUK 2025 Conferences, and a permanent member of the Griff Investment Fund. With a background as a financial services practitioner, she has extensive experience in various financial products, seamlessly bridging the gap between academia and industry. Her research focuses on market microstructure, particularly in high-frequency stock trading, market liquidity, trading behaviour, and market dynamics. Maryam actively disseminates her research findings, contributing to international meetings, engaging with market regulators, and presenting at international conferences.

Alexander McNeil-Professor in Actuarial Sciences

Professor Alexander McNeil is 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.

Fabien Baugard

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, Fabien offers CV clinics and leads 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 into future careers.

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GRADUATE PANEL

Daian Akand-Investment Banking Analyst-Citi

Daian graduated from the University of York with a 2.1 in BSc (Hons) in Economics and Econometrics. He served as Speakers' Officer and then co-president of the Economics Society. In 2022 he undertook an internship at Citi within Global Markets and securitization before then doing another in 2023 within Investment Banking, Loans, and Leveraged Finance. He is currently an Investment Banking Analyst at Citi on rotation within Loans and Leveraged Finance, with his upcoming rotation being in SSA Debt Capital Markets.

Demi Ogunwusi-Global Credit Analyst-Royal London Asset Management

Demi studied BSc Economics at York and graduated in 2021. He undertook internships with Roxbury Asset Management, Barings, and LGIM. Following his studies at York, Demi started at Barings in Sep-21 as a Graduate High Yield Credit Analyst. Following completion of the graduate program, he then joined Royal London Asset Management as a Global Credit Analyst, specialising in technology & media.

Owen Munday - Master's Student

Owen graduated from York in 2024 with a 2:1 in BSc Economics, before joining the University of Sheffield to study MSc Financial Economics. He joined Griff in his second year of undergraduate, spending his first year as an analyst in the Materials and Industrials sector before becoming the first head of Tactical and Thematic Investments in his final year in the fund.

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CORPORATE SPONSORS

HSBC Asset Management

HSBC Asset Management is a major global asset management firm managing assets totaling USD765 billion as of 30 September 2024, with well-established businesses in Europe, Asia-Pacific, the Americas, and the Middle East. They 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. Their investment capabilities span 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.

The Chartered Institute for Securities & Investment (CISI)

The Chartered Institute for Securities & Investment (CISI) is a global professional body that sets the highest standards of professional excellence in a broad range of financial services disciplines. For over 30 years, they have been championing integrity, raising individual standards of knowledge, skills, and behavior in the UK and internationally, and working to enhance public trust and confidence in financial services ever since we emerged from the London Stock Exchange in 1992. Their membership offers a best-in-class continuous personal development program, networking, and events that enable flexible learning to enhance career progression. They also offer a breadth of choice of internationally recognised and respected highest-quality qualifications.

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