

SMIF | UK26

GRIFF INVESTMENT FUND

17th of February, 2026
THE GUILDHALL, YORK

PLATINUM SUPPORTER



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SMIF | UK26

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. The aspiration to launch Europe's first SMIF Conference was a long-time dream and it is with great excitement that we were able to do so through the initiation of the SMIF|UK Conference Series in 2022.

SMIF|UK26 is the fifth edition of SMIF|UK Series, and is based in The Guildhall, York. The goal of this year's event is to provide a space for members of Student-Managed Investment Funds to learn, socialise, enhance their CV's and network with industry professionals. The Stock Pitch Competition provides the opportunity for students to put their intellectual prowess to the test, while offering incentives to support students.

Our aim is to continue to attract funds from across the UK and Europe, and to foster new friendships for the future. We believe that this conference has laid the foundation to bring together an increasing number of students for many years to come, and to build the connections that will remain relevant once you enter your career.

Finally, our sincerest thanks to the School for Business and Society-University of York, HSBC Asset Management, CFA Institute, CISI, EY, CAIA, York Angels and everyone else involved in the conference for their support in making this year's event possible.

We hope you enjoy!

SMIF|UK26 Organising Committee

ORGANISING COMMITTEE



LEWIS RAMSDEN
Academic Chair of the Organising
Committee
Academic Staff - University of York



JACK CAMPBELL
Student Chair of the Organising
Committee
CBDO - Griff Investment Fund



TOM MCMAHON
Merchandise Coordinator
Analyst - Griff Investment Fund



LIV XERRI
Graduates Coordinator
Analyst - Griff Investment Fund



GEORGE RAINBOW
Speakers Coordinator
Analyst - Griff Investment Fund



RUKUDZO CHINAKE
Marketing Coordinator
Marketing - Griff Investment Fund



HARRY BHAGANIA
General Support
Analyst - Griff Investment Fund



LIV HOWARD
Social Media Coordinator
Analyst - Griff Investment Fund



SASHA HEER
SMIF Coordinator
Analyst - Griff Investment Fund



ELLE-ROSE WATERS
Sponsorship Coordinator
CFO - Griff Investment Fund

WHO WE ARE



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 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.



The SMIF\UK25 Event

AGENDA

17th of February 2026

- 09:00 - 09:30 Registration and Tea
- 09:30 - 09:40 Welcoming Address from Lewis Ramsden and Samuel Ip
- 09:40 - 10:00 Edward Conroy - Keynote Address from HSBC Asset Management
- 10:00 - 10:20 Rob Langrick - CFA Program 2026 & The Skills Needed in an AI World
- 10:20 - 10:40 Sam Hields - Life in Venture Capital
- 10:40 - 11:00 Networking, Coffee & CV Clinic
- 11:00 - 13:00 Stock Pitch Competition Judged by HSBC
- 13:00 - 13:40 Lunch and Picture
- 13:40 - 14:00 Clare Wood - It's All About The People
- 14:00 - 14:20 Katie Mint - Sustainable Investment at Aberdeen
- 14:20 - 14:40 Paul Griffiths - A Fireside Chat with a Former CIO & CEO
- 14:40 - 15:10 Senior Graduate Panel
- 15:10 - 15:40 2025 Graduate Panel
- 15:40 - 16:00 Networking, Coffee & CV Clinic
- 16:00 - 16:20 Lee Phelan - Understanding Digital Assets at EY
- 16:20 - 16:40 Nick Stamenkovic - Being an Economist at HSBC Asset Management
- 16:40 - 16:50 HSBC Stock Pitch Prize
- 16:50 - 17:00 Closing Address by Jack Campbell
- 17:00 - 19:00 Merchant Hall Drinks Sponsored by York Angels

SPEAKER BIOS



Edward Conroy

Head of Equity Research at HSBC Asset Management

Edward Conroy is Global Head of Equity Research at HSBC Global Asset Management. He has been a portfolio manager in the Global Emerging Markets Equity team within HSBC Asset Management in London, with experience of managing Emerging Markets and Brazil equity portfolios, and has been working in the finance industry since 2004. Prior to joining HSBC as an analyst in 2008, Ed worked as part of the Global Emerging Markets Equities team at Aberdeen Asset Management. Ed holds a master's degree in Molecular and Cellular Biochemistry from Oxford University (UK), has achieved the CFA Institute Certificate in ESG investing and is a CFA charterholder. Prior to his time in finance, Ed worked as a musician in the British Army.



Rob Langrick

Chief Product Advocate at CFA

Rob Langrick, CFA, CIPM, is Chief Product Advocate for CFA Institute based out of the New York office. He was previously GM of the CFA Program and before that Head of Practice Analysis, overseeing annual curriculum updates to the CFA Program. Before joining CFA Institute, he led Bloomberg's finance education division where he built and launched Bloomberg's certification product, which has now garnered over 1M designation holders. He began his career as a sell-side equity research analyst in London and after earning his MBA from Dartmouth worked in the private equity diligence unit of Bain & Company in New York.



Sam Hields

Partner at OpenOcean

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 time in JPMorgan's Cyber Defence team focusing on application security.

SPEAKER BIOS



Clare Wood

Equity Investor, Speaker, Writer and Analyst

Clare Wood has spent 25 years in the equity markets covering analysis, portfolio management, investment risk and product design. She has worked across a wide array of different strategies from pure quantitative market neutral to fundamental, bottom-up, benchmark agnostic. 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.



Katie Mint

Sustainable Investment Analyst at Aberdeen

Katie Mint is a Sustainable Investment Analyst in the Sustainable Investment Team at Aberdeen, specialising in Active Ownership and Stewardship with a focus on engagement. She joined the firm in 2019 through the School Leavers Programme and transitioned into a permanent role after completion. Katie recently graduated with First Class Honours in Business Management from the Aberdeen Business School at Robert Gordon University, where her dissertation explored the legal, ethical and reputational impacts of human rights abuses in the mining sector in the context of the Just Transition. She also holds the Investment Operations Certificate and is a member of the UK's Sustainable Investment and Finance Association Future Leaders Programme.



Paul Griffiths

Investor & NED

Paul's roles in the Investment industry over the last 30+ years have included CEO, CIO and Portfolio Manager at several companies including Aberdeen, AXA, First Sentier, HSBC & Invesco. His focus today is as a Non-Exec. Director, and as an Advisor/Mentor for firms implementing AI in the decision making process. A passionate believer in developing investment talent, Paul is the founding funder of the Griff Investment Fund, a student-run investment portfolio based at the University of York. He holds a BSc (Hons) in Physics from the University of York.

SPEAKER BIOS



Lee Phelan
Digital Partner at EY

Lee Phelan is a partner based in EY's Leeds office. Lee joined the firm in 2003 having graduated from the University of Leeds, and made Partner in 2017. Having begun his career in audit, Lee now works in EY's Data Analytics Enablement team, which has allowed Lee to follow his passion for Data Analytics. Lee's current work involves developing and supporting the delivery of digital audit across EY, and is the current head of the UKI Assurance Automation department.



Nick Stamenkovic
Senior Economist at HSBC Asset Management

Nick has gained significant experience working as a macro economist for a variety of financial institutions, including UK and overseas banks, focused on major global economies. He has a particular interest in global fixed income markets and central bank policy. Currently, he is a senior economist in the global investment strategy team at HSBC Asset Management, focused on the UK and Japan within a global context.

SENIOR GRADUATES



Jack Hubbard

Jack is an Equity Finance Trader at UBS, currently rotating within Stock Borrow and Lending. Prior to joining full-time, he completed two summer internships at the bank across Sales, Trading & Structuring and a placement year at a boutique inter-dealer broker broking Equity Finance in Dubai. While at the University of York between 2020 and 2024, he was a member of Griff, holding roles including Sector Head and Chief Operating Officer.

Weng is an Equity Research Associate at Jefferies, supporting coverage of the European Internet sector. He joined the firm as a graduate associate in August 2024, having previously completed a summer internship with the team the year prior. Weng graduated from the University of York in 2024 with a degree in Economics & Finance. During his studies, he actively contributed to the university's student-managed investment fund, the Griff Investment Fund, where he conducted research and developed investment strategies, taking on the role of Chief Investment Officer in his final year.



Weng Lum Khoo



Mona Hosny

Mona works in Strategy & Commercial at EEI Egypt, a power and electrical industrials manufacturer. She previously worked as an Intern and Analyst at NorthWall Capital, a London-based private credit investment manager. She holds a BSc in Business and Management with a Year in Industry from the University of York. During her time at the Griff Investment Fund, she held roles including CBDO and served on the founding committee of the SMIFUK Conference.

SENIOR GRADUATES

Demi studied BSc Economics at York and graduated in 2021. Whilst at York, he was a member of the City of York Athletics Team & the Halifax football team. He also undertook internships with Roxbury Asset Management, Barings and LGIM. Following his studies, Demi started at Barings in Sep-21 as a Graduate High Yield Credit Analyst. Upon completion of the graduate program, he then joined Royal London Asset Management as a Global Credit Analyst, specialising in European Technology & Media Investments. Most recently, his focus has been on opportunities in the leveraged loan market to support the launch of a new fund.



Demi Ogunwusi



Charlie Cooling

Charlie is a Senior Auditor, and joined EY's London office in 2021, where he has since worked across the audits of companies of varying sizes operating in sectors ranging from Energy to Media, Entertainment and Sport. Charlie graduated from the University of York in 2020 having studied Economics and Politics.

Faz Kazmi is a technology, product, and risk specialist working at the UK Space Agency, supporting the first-ever launches from the British Isles. Previously, he worked in Risk Management and Intelligence at Meta, where he developed product features and led policy positions, including during the 2023 UK Local Elections, as well as for crisis events like the death of Queen Elizabeth II. Faz is also Chair of the University of York's Alumni Advisory Board.



Faz Kazmi

2025 GRADUATES



Efe Kitis

Efe is a Finance Graduate at UBS, currently working in Group Treasury Product Control with a focus on Structural FX. He supports the control and reporting of foreign exchange risk across the firm's global balance sheet, working closely with the treasury's traders. He studied Economics and Finance at the University of York, was a member of Griff for three years, and previously interned at Kroll in Restructuring and Turnaround Advisory.

Francesca is a 2025 International Relations graduate with a year in industry at UBS Asset Management, sitting in the investment and digital assets risk team. During her placement, she earned the CFA Investment Management Certificate. She is now a graduate at UBS, with her home team being in bank-wide AI transformation initiatives. She is currently on rotation within the Global Markets Equities Client Office



Francesca Kent



Harvey Hester

Harvey graduated from the University of York in June 2025 with a degree in Economics and Finance. During his studies, he served as CCS Sector Head at the Griff Student Investment Fund and competed in stock competitions such as the Oxford Varsity challenge. After interning with Equitix's private equity Management Services division, he joined Vp Plc's Commercial Graduate Programme, rotating across corporate finance, commercial analysis, pricing, and performance projects.

2025 GRADUATES



Louis Warren

Louis graduated the University of York with a 1st in Computer Science. During his time at university, he completed a year in industry at Rolls-Royce, was part of the Army Reserves (UOTC) and joined Griff in his final year. He then went traveling, completed a financial analyst summer placement and is now working full time in aerospace engineering.

Charles graduated from the University of York with a degree in Natural Sciences in 2025. During 2024–25, he was an analyst at the Griff Investment Fund, working in the Thematic and Tactical sector. He has completed internships at J.P. Morgan as an Operations Analyst and at TD Securities in Sales & Trading, specialising in Equity Derivatives. Charles is currently studying for an MSc in Finance at Imperial Business School and will return to TD Securities as a Graduate Analyst this summer.



Charles Ginn

CORPORATE SUPPORTERS

HSBC ASSET MANAGEMENT



HSBC Asset Management is one of the world's leading asset management firms, overseeing \$852 Billion in assets as of September 2025. With presence across Europe, Asia-pacific, the americas and middle east, it connects clients to investment opportunities across global markets. Offering expertise across equities, fixed income, multi-asset, alternatives and liquidity, HSBC Asset Management delivers globally consistent, disciplined investment solutions powered by local insight and deep industry knowledge.

CFA INSTITUTE



CFA Institute is a global association of investment professionals dedicated to promoting ethics, education, and excellence. Renowned for the Chartered Financial Analyst® (CFA) qualification, it equips members with the expertise to drive responsible investment worldwide. With a community of over 190,000 members, CFA Institute continues to shape the future of the investment industry through integrity and leadership.

CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT



The CISI is a leading global professional body across a broad range of financial services disciplines. With over 57,000 members across 120 countries, it sets the benchmark for excellence and integrity in financial services. Through its recognised qualifications, training and membership CISI upholds the highest standards of competence and ethical conduct worldwide.

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GRIFF INVESTMENT FUND

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