

CIF 2019 Workshops

These sessions are being run at 10.40 and repeated at 11.30.

Workshop Seven

CCLA: Forecasting, risk and the role of luck in investment markets

“If you can look into the seeds of time, and say which grain will grow and which will not, speak then to me.” Macbeth - Act 1, Scene iii

Banquo questions the witches; charity trustees ask the same of their existing and prospective fund managers; and, depending on the answers, who will be anointed is determined.

Panel: **James Ayre**, portfolio manager - global equities, **James Bevan**, chief investment officer, **Michael Ekaette**, quantitative investment and risk and **Charlotte Ryland**, portfolio manager - balanced funds, CCLA

Workshop eight

Rothschild & Co Wealth Management: Fighting against our instincts: behavioural biases and how to deal with them when investing

Behavioural biases are built into our DNA and they can easily lead to investment mistakes, which is why at Rothschild & Co we work hard to make sure that we identify such biases and counter as best as we can.

Andrew Blair, director – charities and **Nandu Patel**, head of charities, Rothschild & Co Wealth Management

Workshop nine

Ruffer: Environmental risks and opportunities – important considerations for charity trustees

Ruffer's responsible investment team will discuss the landscape of environmental risks and opportunities within investment portfolios. Focusing on how investment managers can integrate environmental issues into their investment process for charity clients. Using climate change as an example, we will provide an overview of the engagement and divestment debate. We will be drawing on recent company engagements to illustrate how active stewardship can be effective.

Franziska Jahn-Madell, director - responsible investment and **Alexia Palacios**, associate - responsible investment, and **Oliver Shale**, investment associate, Ruffer

Workshop ten

Rathbone Investment Management: A practical guide to CC14 – the Charity Commission's guidance on investment matters for trustees

One of the most important roles of a trustee is to manage your charity's resources responsibly. That means exercising sound judgement and not taking unnecessary risks, particularly when it comes to investing. You need to make balanced and adequately informed decisions, which involves thinking about the long term as well as more immediate concerns. Our aim is for you to take away some practical insights to assist you when making those important decisions

Andy Pitt, head of charities London and **Gareth Pearl**, investment manager, charity team, Rathbone Investment Management

Workshop eleven

Aberdeen Standard Investments - Hope or hopelessness? The main political themes shaping the investment landscape for charity investors 2 years on from the EU referendum

The Brexit referendum will have profound implications for the UK economy but exactly how is unclear for many investors. It is also only one of the political challenges facing investors globally.

Luke Bartholomew, economist, Aberdeen Standard Investments Research Institute

Workshop twelve

Cazenove Charities: Intentional investing

Connecting a charity's mission and aims with its investment strategy can be a challenge. This interactive session examines the principles at stake and considers the practicalities. You will have an opportunity to share your experiences in constructing a responsible investment policy with other delegates and together we will examine current trends and 'best practice'.

Kate Rogers, head of policy and **Emilie Shaw**, portfolio manager, Cazenove Charities