

UK

IMPACT SEMINAR SERIES

IMPACT INVESTING EVENT FOR INSTITUTIONAL INVESTORS

25 September 2024
London



The **Impact Seminar Series - UK** is tailored to institutional investors and asset owners based in England, Scotland, Northern Ireland, and Wales. It consists of a one-day programme with keynote speeches, panel discussions and fireside chats, touching upon the challenges and opportunities within the impact investing universe.

Institutional investors and impact fund managers will be able to exchange best practices, learn from each other's experiences, and share ideas on creating innovative and scalable solutions to generate impact in private and public markets.

THE AGENDA WAS CREATED WITH INPUT FROM:

- **Abraham Mendes Da Costa**, Investor Engagement Officer, Better Society Capital
- **David Gowenlock**, Sustainable and Impact Investing, Cambridge Associates
- **Evalinde Eelens** MBA MSC FRM CAIA, Professional Board Member- Pension Funds; Founder, Ravenna Consulting
- **Ismat Imaan**, Investor Relationship, Better Society Capital
- **Leopold Oettingen-Wallerstein**, Co-Founder & Corporate Development, Bullfrog Capital
- **Linda Carmody**, Senior Relationship Manager, Better Society Capital
- **Marta Jankovic**, Head of Sustainability, Stafford Capital Partners
- **May Rahmani**, Principal Banker, Product Development, Debt Mobilisation, European Bank for Reconstruction & Development (EBRD)

HOSTED BY:



WITH THE SUPPORT FROM:



AGENDA

9:00 – 9:30	Registration
9:30 -9:40	Welcome word <i>Speaker: Chantal Hermans, COO, Phenix Capital Group</i>
9:40 -11:00	Masterclass for investors Phenix Impact Investing Academy: The real weight of biodiversity in portfolio construction <i>This masterclass is brought to you by the Phenix Research team. As biodiversity emerges as a critical factor in sustainable investments, finance professionals are challenged to reassess traditional portfolio construction.</i> <ul style="list-style-type: none"> <i>This masterclass will begin with a data deep-dive of the biodiversity investing landscape</i> <i>This masterclass will explore how biodiversity is intertwined with every investment decision and its implications for fund selection.</i> <i>Participants will take part in a group assignment and role-play exercise, assuming the roles of various asset owners to uncover and prioritize their values, helping to identify investable themes.</i> <i>Participants will further engage in a sourcing & impact fund selection exercise to build a robust impact portfolio aligned with the identified values. The groups will utilise a sourcing tool, the Phenix Impact Fund Database, which tracks over 2,700+ institutional-quality impact funds worldwide.</i> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> <i>Niki Natarajan, Head of Research, Phenix Capital Group</i> <i>Gemma Roex, Impact Measurement and Management Lead, Phenix Capital Group</i>
11:00-11:15	Networking break
11:15-11:50	Fireside chat The case for investing in social and affordable housing <i>In this panel discussion, investment professionals will explore challenges and opportunities in impact strategies focusing on social and affordable housing. They will also discuss their responsible investment policies, and how they collaborate in the industry with the government and regulatory bodies.</i> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> <i>Abdul R Shiil, Co-Founder & Director of Sahan Cares CIC</i> <i>Ben Denton, Chief Executive Officer, Legal & General Affordable Homes</i> <i>Jonathan Flory, Senior Adviser Government and Enterprise, Social Finance UK</i> <p><i>Moderator: Marie-Alix Prat, Investment Manager, Better Society Capital</i></p>
11:50-12:15	Interview Investing in the blue economy: Why joining the dots is key to accelerating change

The blue economy promises immense opportunities for growth, but what are investible solutions? This interview gives an overview on sustainable investments in the blue economy, green shipping, aquaculture, and the fight against plastic pollution. An expert speaker will discuss the balance between economic benefits and environmental impact, challenging views on investments in the blue economy.

*Speaker: **Raphael Ghiandai**, CFO, The Prince Albert II of Monaco Foundation*

*Moderator: **Niki Natarajan**, Head of Research, Phenix Capital Group*

12:15-13:00 Lunch

13:00-13:45 Investor panel | What is the impact investing journey for family offices?

How do families research their values, and how the different appetites for impact and risk are reflected in a family's portfolio? The panellists will share their journey in the development of an impact strategy.

Speakers:

- **Francesca Spoerry**, Head of Trainings and Partnerships, Center for Sustainable Finance and Private Wealth (CSP) - University of Zurich
- **Harry Davies**, Principal, Ceniarth
- **Mark Florman**, CEO, Time Partners
- **Nick Rees**, Managing Director, Private Client Practice, Cambridge Associates

*Moderator: **Alessandra Caine**, Impact Relations Manager, Toniic*

13:45-14:00 Keynote speech | Empowering SMEs: Activating AI-Powered Tech for Impactful Investment Pathways

This presentation will explore how AI and Technology can be harnessed and leveraged for good from the perspective of deploying capital to SMEs from Family Office and Corporate Foundation perspectives.

*Speaker: **Grace Almendras – Castillo**, Founder and CEO, Giffitid*

14:00-14:15 Networking break

14:15-14:35 Case study | Institutional investments tackling health equity

In this case study, Sergio Ung, Investment Associate, at the Guy's & St Thomas' Foundation will present how the Foundation uses both its position as an investor and its grant funding work to tackle health inequity. The session will highlight the initiatives by Guy's & St Thomas' Foundation and their collaboration with the NHS and the government to promote health equity.

*Speaker: **Sergio Ung**, Investment Associate, Guy's & St Thomas' Foundation*

14:35-15:30 Panel discussion | How can investors ensure they are adequately prepared for the climate transition and the potential challenges it presents?

The climate transition presents both challenges and opportunities for investors. This panel will delve into the complexities of investing in climate transition, focusing on private markets and real assets, such as investments asset-backed infrastructure, decentralized energy plants, private equity and timber optimised for carbon sequestration. Speakers will discuss the diligence needed to mitigate risks of greenwashing and the potential underestimation of climate risk in current scenarios, such as those presented by the Task Force on Climate-related Financial Disclosures (TCFD).

Speakers:

- **Cristiana Dochioiu**, Investment Manager, Railpen
- **Leopold Oettingen-Wallerstein**, Co-Founder, Bullfrog Capital
- **Marta Jankovic**, Head of Sustainability, Stafford Capital Partners
- **Matt Robinson**, Head of Private Capital Mobilisation, British International Investment

Moderator: **Jonathan Craddock**, Director - Fiduciary Management & Institutional Solutions, Van Landschot Kempen

15:30-15:40 Announcement | CFA Institute Diversity, Equity, and Inclusion Code (UK)

The CFA Institute Diversity, Equity, and Inclusion Code (UK) is a set of principles developed to drive greater diversity, equity, and inclusion within the investment industry in this market. The Code equips signatories with the tools to drive meaningful change, create a more inclusive working environment, and generate a cycle of positive change.

Speaker: **Lindsey Stewart**, Chair, CFA Institute DEI Code UK Working Group

15:40-17:00 Networking drinks

REGISTRATION IS COMPLIMENTARY FOR ASSET OWNERS, [REGISTER HERE>>](#)

