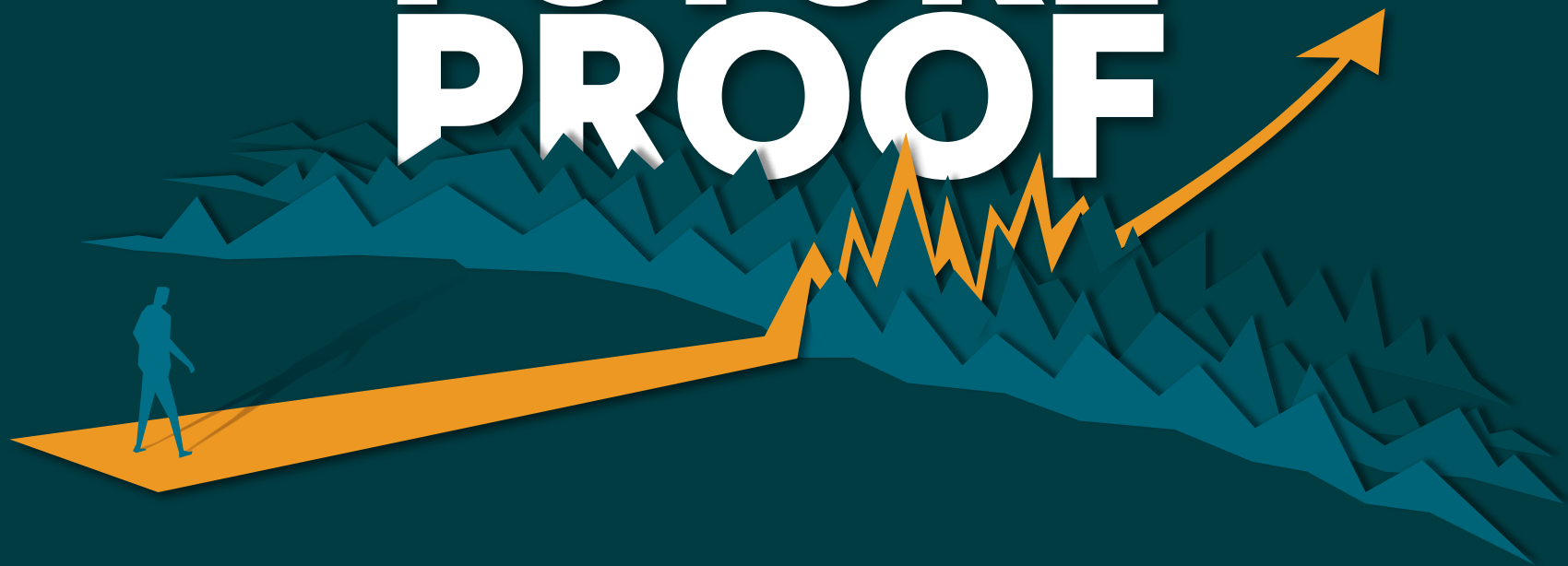


SUSTAINABLY **FUTURE** **PROOF**



Wednesday 19 Nov 2025 / BAFTA, 195 Piccadilly, London



Welcome

Thank you for joining us today for what promises to be a thought provoking and inspirational event.

Curation of the agenda began in January, and the question we thought would still be burning is: “How will the world’s political backdrop, and particularly the US presidency, impact the future prospects for sustainable investment?” We believe our keynote, Dr Linda Yueh CBE, whose distinguished background in international economics and policy will provide invaluable perspective.

Sustainable investing has been through a storm in recent times, during the early 2020’s many jumped on the green wagon claiming allegiance. But, as war ignited energy prices and sparked rising interest rates, the more sustainable investments found the

going tough. The faint hearted took cover. As one of my friends (outside the industry) said to me the other day: “people’s values haven’t changed, so why has money exited these funds?” That’s a good question.

There are many tangible signs of market transition despite the headwinds. However, one requirement doesn’t change. The willingness of a few investors who view the world beyond simple self-interest. Who might say ‘I want to generate investment returns, but not at any cost’. Not at any cost to the planet, to nature restoration, to communities and society.

You may be here today as you still believe that sustainable investing will ultimately deliver outcomes that meet your clients’ objectives. We hope today you will be inspired and

encouraged to continue exploring your clients’ values, aligning their wealth strategy and making a real difference in the process.

Despite all the political posturing, negative narrative on net zero and unpredictability of global markets, now is the time for ‘the few’ to continue resolutely down the road less travelled.

It’s time for clear heads and courageous hearts to press on towards a better way – a way that will be better for all of us.

Towards investments that are forever ‘Sustainably Future-Proof’.

GAVIN FRANCIS, CEO, Worthstone



Agenda

0900-0930

Arrival and refreshments

0930-0940

Welcome and introduction

Speaker: Gavin Francis, CEO, Worthstone

0940-1010

How US tariff policies and global climate pressures will shape the future of sustainable investment in the UK

Dr Linda Yueh CBE, a leading economist and author, will begin our day discussing how international policies will affect the future of sustainable investment.

Speaker: Dr Linda Yueh CBE, Fellow in Economics, St Edmund Hall, Oxford University and Adjunct Professor of Economics, London Business School.

1010-1030

On Wednesdays we wear pink – why it is time to break down the sustainability clique

In Mean Girls, Regina George famously declares “on Wednesdays we wear pink” — a symbol of exclusivity that mirrors how sustainable investing can sometimes feel. But as ESG evolves, we at CCLA believe it’s time to move beyond the clique, reflect on our purpose, and build a more inclusive and forward-looking future, as highlighted in our latest client survey

Speaker: James Corah, Head of Sustainability, CCLA

1030-1045

Shaping the conversation: Simple strategies to win hearts, minds, and assets in sustainable investing

Step into this two-part session to discover how reframing the investment conversation and other applications of behavioural science can turn good intention into concrete commitment.

Staying on the sidelines is no longer an option. The future of investment is being rewritten by the realities of societal and environmental change. And those who lead the conversation stand to capture its rewards.

Speakers: Mark Hauser, Applied Behavioural Scientist, and Sally Tarbit, Director, Brand Activation, The Team



Agenda (Continued)

1045-1120

MID MORNING CORRIDOR CONVERSATION

Stream 1: Financial Advisers (Princess Anne Theatre)		Stream 2: Fund Selectors (Ray Dolby Room)	
1125-1145	Wellth: Jon Cobb, Trinity Wealth Management & Gavin Francis, Worthstone	1120-1130	Regulatory Slot: Phil Spyropoulos, Eversheds Sutherland
1145-1205	US Equity Impact: David Rowlett, T Rowe Price	1130-1150	Emerging Markets: Timothy Hay, Stewart Investors
1205-1225	Transition Materials: James Richards, Fidelity	1150-1210	Financial Inclusion: Nduka Amadi, Baillie Gifford
1225-1245	Global Government Sustainable Bonds: David Katimbo-Mugwanya, EdenTree	1210-1230	Engagement: James Corah & Sam Pennefather, CCLA
1245-1255	Regulatory Slot: Phil Spyropoulos, Eversheds Sutherland	1230-1250	Nature & Biodiversity Solutions: Ben Constable Maxwell & Charlie Anniss, M&G

1300-1400

LUNCH AND NETWORKING

1400-1430

Shaping the conversation: Simple strategies to win hearts, minds, and assets in sustainable investing” (II)

Step into this two-part session to discover how reframing the investment conversation and other applications of behavioural science can turn good intention into concrete commitment.

Staying on the sidelines is no longer an option. The future of investment is being rewritten by the realities of societal and environmental change. And those who lead the conversation stand to capture its rewards.

Speaker: Mark Hauser, Applied Behavioural Scientist, The Team

Stream 1: Financial Advisers		Stream 2: Fund Selectors	
1430-1450	Emerging Markets: Timothy Hay, Stewart Investors	1430-1450	US Equity Impact: David Rowlett, T Rowe Price
1450-1510	Financial Inclusion: Nduka Amadi, Baillie Gifford	1450-1510	Transition Materials: James Richards, Fidelity
1510-1530	Engagement: Amy Browne & Sam Pennefather, CCLA	1510-1530	Global Government Sustainable Bonds: David Katimbo-Mugwanya, EdenTree
1530-1550	Nature & Biodiversity Solutions: Ben Constable Maxwell & Charlie Anniss, M&G	1530-1550	Regulatory Slot: Phil Spyropoulos, Eversheds Sutherland

1600-1605

Key takeaways and closing remarks

Speaker: Gavin Francis, Founder and CEO, Worthstone



“It is not in the stars to hold our
destiny but in ourselves.”

WILLIAM SHAKESPEARE



Plenary Speakers



Gavin Francis | Founder and CEO, Worthstone

Gavin started working in financial services and alongside the advisory community in 1989. In 2010, he founded certified B Corp, Worthstone, which was the UK's first targeted sustainable investment resource platform for Financial Advice professionals. In addition to co-authoring several ground-breaking reports, Gavin has participated in government working groups to help develop sustainable investing in the UK. He is also one of the founding team of Wellth, a Sustainable Investment Managed Portfolio Service (MPS).



Dr Linda Yueh CBE | Economist

Dr Linda Yueh CBE FREcon is Fellow in Economics, St Edmund Hall, Oxford University and Adjunct Professor of Economics, London Business School. She is an Associate Fellow of the US and the Americas Programme at Chatham House and a Member of the UK Soft Power Council. She is a Non-Executive Chair and Director of several public and private companies and is a Trustee of the Fidelity UK and International Foundations. She is the author/editor of 11 books, including The Great Economists.



James Corah | Head of Sustainability, CCLA

Architect of sustainable investing at CCLA. Delivering real and lasting change through active stewardship, integrating ESG factors into our investment processes and ensuring portfolios are aligned with our clients' values. These programmes have improved corporate behaviour on climate, the Living Wage and modern slavery. Recognised in Investment Week's Sustainable Investment Awards 2023 for his Outstanding Contribution to the Sustainable Investment Industry.



Mark Hauser | Applied Behavioural Scientist, The Team Brand Communication Consultants

Mark joined The Team in 2021, bringing a deep understanding of psychology and human behaviour to the world of brand design and communications consultancy. As an applied behavioural scientist, he has leveraged the power of human understanding to help The Team build effective employee engagement programmes, drive sustainable behavioural shifts in the world of transport & finance, and design effective communications campaigns.



Sally Tarbit | Director, Brand Activation The Team Brand Communication Consultants

Sally leads The Team's Brand Activation offer and brings 36 years of client and agency experience to her work. Her career spans multiple sectors, including financial services, technology, and transport, driving direction and strategy for brands, campaigns and content. Sally also believes in the power of applying behavioural science to her work to drive greater effectiveness. She is alumni of the Cambridge University Institute of Sustainable Leadership, and champions sustainability for all.



Jon Cobb | Director, Trinity Wealth Management

Jon has been in financial services since 1995. He heads up the Investment Committee at Trinity and also chairs the Wellth Advisory Committee. Seeing clients remains the most enjoyable part of his responsibilities. He is fortunate to surround himself with good staff. Outside of work, Jon is a keen angler and also supporter of Portsmouth FC.



David Rowlett | Portfolio Manager, T. Rowe Price

David Rowlett is the portfolio manager for the US Impact Equity Strategy in the U.S. Equity Division. He is a vice president and member of the Investment Advisory Committees of the US Large-Cap Growth Equity, US Large-Cap Core Equity, Global Industrials Equity, and Global Impact Equity Strategies and a vice president of the International Funds. David is a vice president of T. Rowe Price Group, Inc.



David Katimbo-Mugwanya | Head of Fixed Income, EdenTree Investment Management Ltd

David, as Head of Fixed Income, leads on EdenTree's Sterling, Short-Dated and Global Sustainable Government Bond Funds. David joined EdenTree in 2015 and has close to two decades' investment expertise within the asset class across sovereigns, corporate debt and money markets portfolios via designated mandates as well as bespoke investment solutions.



James Richards | Senior Industry Analyst, Fidelity International

James has been working in the investment management industry since 2004, having previously trained as a chartered accountant at PwC. He has been at Fidelity since 2018 covering the metals and mining sector as an analyst, also since 2023, has been co-managing the Transition Materials strategy. He has previous experience mostly as an analyst but also as a PM at Thames River/ Nevsky Capital (analyst/partner), GIC (sector and generalist PM) and HSBC (sell-side analyst).



Timothy Hay | Analyst & Portfolio Manager, Stewart Investors

Timothy joined the Stewart Investors team in April 2024 with 20 years' experience in Global Emerging Market equities. Previously he was at Somerset Capital Management for 16 years having started his career at Lloyd George Management in 2003. He holds a BSc in Economic History and Economics from Manchester University and a Masters in Finance from INSEAD.



Nduka Amadi | Investment Specialist, Baillie Gifford

Nduka is an investment specialist in the Clients Department. He joined Baillie Gifford in 2020. Prior to joining Baillie Gifford, he worked at University of Nottingham for six years as a senior international relations manager, with responsibility for the institution's international higher education activities and engagement across Asia, Sub-Saharan Africa, and the Middle East. Nduka graduated MSc (Hons) International Business from the University of Nottingham in 2013 and LLB (Hons) Law from University of Northampton in 2009.



Amy Browne | Deputy Head of Sustainability, CCLA

Amy is responsible for leading and coordinating CCLA's stewardship activity across all areas, from public health and environment to corporate labour standards. Amy led the development of the CCLA Corporate Mental Health Benchmark and oversees the \$9.9 trillion global investor coalition on workplace mental health that supports it. Amy was recognised by the Financial News' Rising Stars of Fund Management in 2023. She has 14 years' experience in investing for charities and non-profit organisations, having previously worked at Cazenove and Sarasin & Partners.



Ben Constable Maxwell | Head of Sustainable and Impact Investing, M&G Investments

Ben leads M&G's strategy on impact investing as well as covering sustainability issues such as climate change and the circular economy. He has been central to the development of ESG integration within M&G's investment processes and has supported the development of ESG solutions for clients across asset classes. Ben plays an active industry role as a member of various sustainable and impact investment initiatives, interacting with companies, policymakers, NGOs and other investors.



Charlie Anniss | Portfolio Manager, M&G Investments

Charlie re-joined M&G in February 2025 to support the Sustain & Impact team. He joins from Union Bancaire Privée, where he launched the Europe Small Cap Equity fund, and subsequently worked as part of the Positive Impact team, launching and co-managing UBAM Biodiversity Restoration, and co-managing Positive Impact Global Equity. Prior to Union Bancaire Privée, Charlie worked at M&G for over 15 years, where he managed the M&G European Smaller Companies fund and the M&G European fund.



Phil Spyropoulos | Partner, Eversheds Sutherland

Phil helps asset managers and wealth managers with their products. He prides himself on knowing the industry, not talking or writing like a lawyer, and giving practical, commercial advice. He has been central in industry discussions on the FCA's SDR.

Conference Anchor:



Abigail Rotheroe | Worthstone Investment Committee

Abigail has over 25 years of investment experience in a variety of roles including that of a sustainable and impact-focused asset manager. Abigail has also managed Asia Pacific portfolios in Hong Kong and London and worked as a fund analyst. She is a CFA Charterholder and now divides her time between Investment Committee roles and as Non-Executive Director for Investment Companies. She is also a member of WHEB Asset Management's Advisory Committee.

WA 2025 social enterprise supply chain



Alongside Regenerative Agriculture training and trauma counselling, Third Hope also provides vocational training, like tailoring and carpentry, which provide further skills that promote resilience and self-respect.

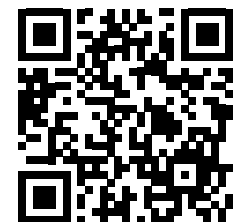


We would like to thank Third Hope Africa for contributing design work to this brochure.

The project seeks to weave learning and therapy into the daily life of ex-child soldiers in Northern Uganda, where, as children, they were abducted from schools and villages by the LRA, a rebel army that terrorised the region for over twenty years.

Could your company become a Partner in Hope?

Scan the QR Code to set up a monthly direct debit.





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M&G Investments is a global asset manager focused on long-term value, income, and responsible investing.



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EdenTree are dedicated to responsible and sustainable investing, having launched our first ethical fund in March 1988.



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Founded in 1988, Stewart Investors are long-term equity investors in high-quality companies.



Fidelity International
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T. Rowe Price
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Worthstone Limited | 10 Orange Street | London | WC2H 7DQ

Tel: 0207 183 6482 | Email: info@worthstone.co.uk

Web: www.worthstone.co.uk | [@worthstone](https://twitter.com/worthstone)

