

# 100WF Monthly Monitor

June 2023



## What's the Monthly Monitor?

100 Women in Finance is excited to deliver this Monthly Monitor to our global community. The Monitor will summarize major organizational updates as well as highlight key events that are relevant to our membership. This edition as well as all historical publications can be found on our website under [News & Updates](#).

## What's New at 100WF?

In June, our volunteer committees led 34 engaging events - in-person and virtual - all aligned with our three key pillars: Education, Peer Engagement and Impact. They created value and opportunity for our members and supporters, and we've had a total of 164 events so far this year!

CEO Amanda Pullinger traveled to Singapore in early June to connect with our members and volunteers in the area, and to meet with colleagues in the financial industry who align with our mission and Vision 30/40 in an effort to explore opportunities for collaboration. Read more about her endeavors in the APAC education section below.

This month our Women on Boards initiative gained renewed traction with two events in the Americas. The first, a webinar "Demystify the Boardroom" was organized by the MidCareer New York committee and the second, "Tips for Board Governance Success, Plus Strategies for an Organization's Portfolio" was organized by the Washington D.C. education committee. 100WF's Corporate/Private Boards Committee connects qualified members to director roles. By increasing the visibility of women through education, training, and networking opportunities, 100WF aims to enhance board representation, recognizing that diverse boards consistently outperform their peers.

Deloitte released their Within Reach Report Update 2023 mid-month, which showed positive progress for women in C-suite and board roles. However, if we are to achieve our Vision 30/40, the climb to gender parity needs to be far steeper. Deloitte has developed a detailed framework, called C.A.R.E., which organizations can use to promote and foster equality in the workplace. We're delighted to have been part of this initiative and will continue to highlight our support for women in finance through our events and initiatives. Click [here](#) for inspiring words from Amanda and to view the "Advancing Women Leaders in the Financial Services Industry: 2023 update - A Global Assessment" report. Let us empower and lift each other up to create an equitable and inclusive future for all.

We're excited to announce that this month Tower Research Capital joined our Corporate Sponsor program, underscoring their steadfast support for 100WF's mission and Vision 30/40.

- Number of 100WF Registered Members: 27K+
- Number of LinkedIn Followers: 43K+
- Number of Locations: 32
- Number of Staff Members: 26
- Number of Volunteers: 600+

# LOCATION UPDATES



## DEI BEST PRACTICES HONG KONG

On May 30th, the Hong Kong committee organized the "DEI Best Practices - Path to Senior Female Representation" event generously hosted by Nomura. Carli Yung, Co-Head of Legal at Nomura Asia brilliantly moderated the event. The panel of speakers included Ambra Debernardi (AIA), Ellie Tang (Fidelity International), and Shelley Yu (MSCI). The discussion revolved around the current corporate landscape which finds itself struggling to meet and exceed medium and long-term targets for female board representation. With an array of industry professionals in attendance, the conversation delved deep into personal anecdotes and strategic conversations about regulatory change and corporate implementation.

## FUNDWOMEN ROUNDTABLE SERIES LONDON

On May 31, 100WF had a fantastic turnout for the Emerging Markets "FundWomen Roundtable" event in London. We were thrilled to have such a great group of female portfolio professionals and to hear from Wei Li, Chief Investment Strategist at Blackrock. Special thanks to our moderator Alan Higgins, who did a wonderful job leading the conversation. Thank you again to Coutts for their sponsorship and to all of our participants for making this event a success. FundWomen events are open to female portfolio managers, please contact our [FundWomen Committee](#) for more information and to register your interest. Female fund managers are encouraged to join 100WF's public directory for greater professional visibility, and to receive invitations for ongoing peer engagement opportunities. Managers register [here](#) and Allocators register [here](#).



## WOMEN ON BOARDS WASHINGTON, D.C.

On June 13, the Washington, D.C. education committee held an in-person event titled "Tips for Board Governance Success, Plus Strategies for an Organization's Portfolio" hosted by Strategic Investment Group. Vivian Fraga Spies of Goldman Sachs offered inspiring opening remarks, followed by panel speakers Hilda Ochoa-Brillembourg, CFA, Chairman Emeritus, and Nikki Kraus, CFA, President and Chief Client Officer at Strategic Investment Group. They gave actionable tips for building successful board governance and adding value to investment portfolios amid unpredictable changes. Guests mingled and enjoyed drinks before the event commenced.

# OUR PILLARS

## EDUCATION

### AMERICAS

On May 30, the Minneapolis education committee produced the event “Allocators’ Perspectives on Opportunities in Private Credit,” hosted by Nassau Corporate Credit and Nassau Private Credit. Moderator Jen Wilson, Senior Managing Director at Thrivent, expertly led an engaging conversation with panelists Kelsey Deshler, Chief Investment Officer at Carleton College, Kristen Jones, Head of US Private Credit, Research Analyst, Partner at Albourne Partners, and Russell Pemberton, Portfolio Manager at Nassau Private Credit. The speakers shared their personal insights to unlocking top investment strategies for private credit investments to prepare for the best and worst possible outcomes in the private credit market. They also walked members through the current landscape and lessons learned from past credit cycles. Following the discussion, members and colleagues had an opportunity to share their views and network during a cocktail hour.



*Pictured left to right: Jen Wilson, Russell Pemberton, Kelsey Deshler and Kristen Jones*

The Boston Education Committee hosted a riveting fireside chat on May 30, featuring financial fraud investigator Harry Markopolos. Thanks to Cambridge Associates for hosting the event. Famous for his involvement in uncovering Bernie Madoff’s Ponzi scheme, Harry gave tips on spotting potential fraudsters and shared stories of his role in helping law enforcement tackle complex cases. A certified fraud examiner, he spoke passionately about his mission to catch crooks. Moderator Meisan Lim, CFA of Cambridge Associates, asked Harry about his experiences, and his path to becoming a professional investigator. Light refreshments were served and guests got a chance to network following the event.



*Pictured left to right: Coleen Howard, Kathleen Kisler, Harry Markopolos and Meisan Lim*



On June 13, the New York education committee produced “Let’s Meet at the Intersection of AI and Finance” generously hosted by Houlihan Lokey. Opening remarks were given by Anna Spector, Chair of the New York education committee, Paulina Rogawski, New York education committee member, and Alexandra Lebenthal of Houlihan Lokey. Michelle Noyes (AIMA) moderated the conversation which included an update on how Artificial Intelligence (AI) is progressing in the realm of finance. Panel speakers Christine Chang (Artesian Capital Management), Claudia Perlich (Two Sigma), and Sai Uppuluri (Houlihan Lokey) shared how participants could consider tapping into the power of AI to elevate their fund strategy and streamline operations. Following the program, attendees shared their perspectives on the opportunities and challenges ahead while networking with colleagues over drinks and appetizers.

# OUR PILLARS (cont'd)

## EDUCATION

### EMEA

Last month, the Geneva committee organized an event on Artificial Intelligence (AI) which was hosted by Banque Syz. Valerie Noel of Banque Syz moderated an engaging conversation with panel speakers Jerome Berthier of Deeplink.ai, Cantonal Judge Katia Elkahim, and Anais Patry of Banque Syz. The impact of technology on work, communication, and thinking was the focus of the discussion. The group delved into AI, analyzing opportunities and challenges, including legal issues and investment. Later, participants had an opportunity to further discuss their views on the benefits and disadvantages of AI in the finance industry while networking with colleagues over drinks and appetizers.



The German committee brought together panel speakers Sebastian Külps, Managing Director at Vanguard Group Europe GmbH, Dijana Lind, ESG Analyst Capital Markets & Stewardship at Union Investment, and Wiebke Merbeth to discuss how ESG can benefit your career. This event was hosted by Union Investment. After a keynote by Wiebke Merbeth, Partner at Deloitte and member of the German government's Sustainability Council, co-moderators Susanne Ballauff, Managing Director at Wellington and Karin Schambach, Partner at Indigo Headhunters led the panel in a discussion about the social and governance aspects of ESG and changes in regulatory policies that influence corporate strategy. Following this lively conversation, members gathered for drinks and snacks to continue the discussion.

On June 7, the Zurich education committee arranged a session spotlighting private equity hosted by LGT Capital Partners (LGT). Hanna Edström, Executive Director at LGT, kicked off the event and shared insights on the topic. During the session, Natalie Sediako, Principal at LGT, provided an in-depth overview of the private equity sector, highlighting its evolution, as well as new and exciting developments in the market. It was an incredible opportunity for networking and sharing knowledge about private equity.



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# OUR PILLARS (cont'd)

## EDUCATION

EMEA *Continued*

The London committee organized a breakfast event on June 8, hosted by Sustainable Fitch, where the topic at hand was “The Role of Fixed Income in Financing the Green Transition.” Transitioning to a low carbon economy is a top priority to meet the goals of the Paris Agreement. Reaching net-zero emissions by 2050 requires coordination and commitment from various parties. Panelists Charlotte Edwards (Barclays), Alex Griffiths (Fitch Ratings), and My-Linh Ngo (RBC BlueBay Asset Management) and moderator Marina Petroleka (Sustainable Fitch), discussed how fixed income plays a crucial role, enabling capital markets to steer towards decarbonization and other ESG areas.



Over 100 members and their guests gathered for a networking event organized by the Dublin committee that was hosted by PwC on June 22. The topic of discussion for the evening was empowering women at work. Andrea Kelly FCA, Partner at PwC opened the session and introduced her colleague, Aoife Flood, Global D&I Strategy, Upskilling and Awareness Lead at PwC. Aoife shared her knowledge of how women view empowerment at work, what women desire, versus what they experience in reality in the financial services sector and in Ireland and globally. It was a hot topic that gave way to an energized buzz in the room as participants continued the conversation long into the evening. During the evening, Ciara McGuinness and Anne Keys were presented with flowers as they step down as co-chairs of the Dublin committee.



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# OUR PILLARS (cont'd)

## EDUCATION

### APAC

In June, CEO Amanda Pullinger traveled to Singapore to connect with members and volunteers, Corporate Sponsors, and colleagues in the financial industry that share 100WF's mission and Vision 30/40. Amanda seized the opportunity to share 100WF initiatives, global reach and platform available to the members of Corporate Sponsors Wellington Management and Tower Research during internal meetings.

Amanda dove into organizing the Singapore Gala with co-chairs Gita Advani and Stephanie Gee. Despite her demanding schedule, she took the time to enjoy lunch with volunteers from the Singapore education committee, brainstorming ideas for local events and engagement.



*Tower Research Session*



*Luncheon with Singapore volunteers*

T. Rowe Price hosted a DEI Roundtable during Amanda's visit which she participated in. This event served as the kickoff for the highly anticipated 100WF DEI Senior Practitioner group that would sit under the Peer Engagement pillar, with further details to come. Thank you to Ashlesha Vaishampayan, co-chair of the Singapore education committee, for organizing this fantastic gathering.



Stephanie Lau, Singapore education committee member, organized Amanda's meeting with the co-founders of the Women in Family Offices (WIFO). The gathering was to facilitate introductions and discuss potential areas of collaboration. WIFO has the potential to be a valuable resource for speakers, as well as a platform through which our members can gain visibility by speaking at WIFO events.

Maybank Prime Brokerage hosted an event "The Breakfast Club," where Amanda joined Singapore education committee co-chair Ginny Cheok, Managing Director - SG Head of Prime Brokerage Sales at BNP Paribas, and Impact committee member Rachana Mehta, Senior Portfolio Manager/Head of Fixed Income at Maybank Asset Management as panel speakers. The session aimed to spotlight the increasing impact of women in finance and their role in promoting gender diversity at work. They discussed diverse topics, such as the changing business landscape, future opportunities, and their personal career journeys. Dalvin Kaur, Regional Head, Legal, Group Global Banking, Maybank Investment Banking Group, provided great moderation, while colleague Dave Forsyth, Head of Prime Brokerage, Asia at Maybank, was instrumental in organizing this successful event.

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# OUR PILLARS (cont'd)

## PEER ENGAGEMENT

Last month, the Early Career New York committee organized a Spring Meet & Greet in the heart of midtown Manhattan at 5th & Mad. Several 100WF Early Career members and their colleagues gathered to connect, hear about the exciting plans for the year ahead, and offer suggestions for event topics.

On May 18, the Early Career Toronto committee produced an event "Boards 101: Empowering Your Leadership Potential Through Governance," hosted by National Bank of Canada. Rebecca Finley-Schidlowsky from Finley & Associates, Ltd. conducted an engaging and interactive workshop which approached governance through a "pracademic" lens which allowed Rebecca to share many of her team's Governance Case Studies which participants helped "solve." The event ran over due to the number of engaging comments and questions for our speaker.



*Early Career New York at 5th & Mad*



*Pictured left to right: Lauren Reid, Farialle Pacha and Rebecca Finley-Schidlowsky*



*Boards 101: Empowering Your Leadership Potential Through Governance*



On May 31, the MidCareer Cayman committee organized a networking event over coffee and pastries at Pane and Pasta in George Town. This event was graciously hosted by Butterfield Bank (Cayman) Limited. Attendees were engaged by the insights that Monique Frederick, Head of Asset Management at Butterfield Bank (Cayman) Limited, shared about her career journey. Monique also outlined the basics of managing debt and investing in the stock market. Jacqueline Terry, Senior Manager of Human Resources at Butterfield Bank Cayman, moderated the discussion.

*Pictured (left): Monique Frederick and Jacqueline Terry*

# OUR PILLARS (cont'd)

## PEER ENGAGEMENT *Continued*

On June 7, the 100WF MidCareer New York committee hosted a webinar entitled "Demystify the Boardroom " for all 100WF MidCareer members across the globe. Moderator Abigail Lewis of Norbury Partners led an insightful conversation with Kate Purmal of illumyn and Him For Her, covering all things related to the boardroom. From gaining a board position to what one can expect when one becomes a board director, Kate shared tips on reaching the boardroom, the differences from an operating role, and the most valuable skills and traits when serving as a board director. A [recording](#) of this event is available for all registered members in the On Demand section of the website.

100WF Board Questionnaires are open to members who would like to be considered for board openings. To access, [login to your 100WF profile](#) and submit your details for corporate/private boards and non-profit organizations.

[Corporate Private Boards Initiative](#)

[Non-profit Boards Initiative](#)

## IMPACT

The 200+ LaunchMe mentors and mentees across the Americas, APAC and EMEA are actively working together on essential career skills. Mentees are eager to explore the multitude of career opportunities that align with their interests and values, and they are building communication skills through thoughtful descriptions of their value proposition. Mentors are challenging assumptions based on current market dynamics that impact the next generation entering the workforce, as well as demonstrating empathetic leadership.

The participants use collaborative communication channels to ask questions, share knowledge and make valuable connections. As a result, students gain diverse perspectives and professionals gain outside perspectives on a variety of topics impacting the financial services industry and the talent within our member base.

Our summer 2023 JumpStart program for university students was held on June 16. This virtual event helps demystify roles in the finance industry and equips students with the information and network to further explore their many future opportunities. Attendees hailed from 17 different countries, including the US, Spain, Japan, South Africa, Kenya, and the UK. Our sincere thanks to all of our panelists and presenters, including keynote speaker Margaret Nienaber, Chief Operating Officer of Standard Bank Group, for their commitment to inspiring the next generation.

Worcester Polytechnic Institute (Worcester, MA) is seeking 2-3 members of 100 Women in Finance to speak on a "Power of DEI for Fintech" panel during their upcoming Future Finance Conference on October 20, 2023 (11 am-2 pm, lunch provided). The panel will focus on the critical importance of diversity, equity, and inclusion (DEI) in the field of Financial Technology (FinTech). In today's interconnected world, where technology-driven financial solutions play a vital role, it is crucial for the industry to embrace and prioritize DEI. This approach will foster innovation, enhance decision-making, and contribute to a more equitable financial landscape. More information about the conference can be found [here](#). Please express interest to [allison@100women.org](mailto:allison@100women.org) by July 15.

# UPCOMING EVENTS



## APAC & AMERICAS INDUSTRY DEI AWARD

Final call for application submissions for the APAC and Americas Industry DEI Award. The goal of the 100WF Industry DEI Award is to encourage innovation and positive action in the area of Diversity, Equity and Inclusion within different firms across the industry. We seek to recognize those organizations that are driving forward and shaping the future of women in the finance industry. 100WF and sponsor J.P. Morgan hope to make these organizations' efforts and positive results more visible to other companies and individuals, inspiring others to be catalysts of change. The application process for APAC and Americas will conclude on July 7. The winner will be announced at the APAC and Americas Galas on November 1 and 8 respectively.

Learn more at [fundraisers.100women.org/industry-dei-award](https://fundraisers.100women.org/industry-dei-award)

## IMPACT INVESTING SYMPOSIUM REGISTER INTEREST NOW!

Applications for the Impact Investing Symposium are now open. Register your interest now! Spots are limited and will fill up quickly. The 2023 program will feature keynote speakers, panel discussions and Table Talks, focused on key investing for impact developments, best practices, analytics, implementation and much more.

Register your interest in attending as a [delegate](#).

Register your interest in [speaking opportunities](#).

Register interest in [sponsoring opportunities](#).

For more information contact [impactinvesting@100women.org](mailto:impactinvesting@100women.org).



## GLOBAL FUNDWOMEN WEEK

The dates for Global FundWomen Week ("GFWW") are set for December 4-8 virtually. The In Person conference will be December 7 in New York. We will be releasing more information soon and volunteer roles are available in a number of different areas, from communications support and allocator recruitment, to manager vetting and onsite assistance. If you have any questions, please email [fundwomen@100women.org](mailto:fundwomen@100women.org).

Learn more at <https://fundwomenweek.100women.org/>

