



P>THW>Y

Developing the female Portfolio Managers of the future

Non Member Company Brochure



The Diversity Project

The Diversity Project is a cross-company initiative championing a truly diverse and inclusive UK investment and savings industry with the right talent to deliver the best possible financial outcomes for our clients, to reflect the society we serve and ultimately build more sustainable businesses.



**>100
Members**



**>£14trillion
in AUM**



**>70,000
Employees**

Our members are investment managers, asset owners, fund selectors, investment consultants, actuaries, trustees, family offices and wealth managers. Our partners and supporters include data providers, recruiters, professional standards authorities, trade bodies, and other organisations within the financial services sector.

Diversity Project Pathway, created for the industry by the industry. This bespoke programme gives you the best opportunity to progress and succeed in becoming Portfolio Managers.

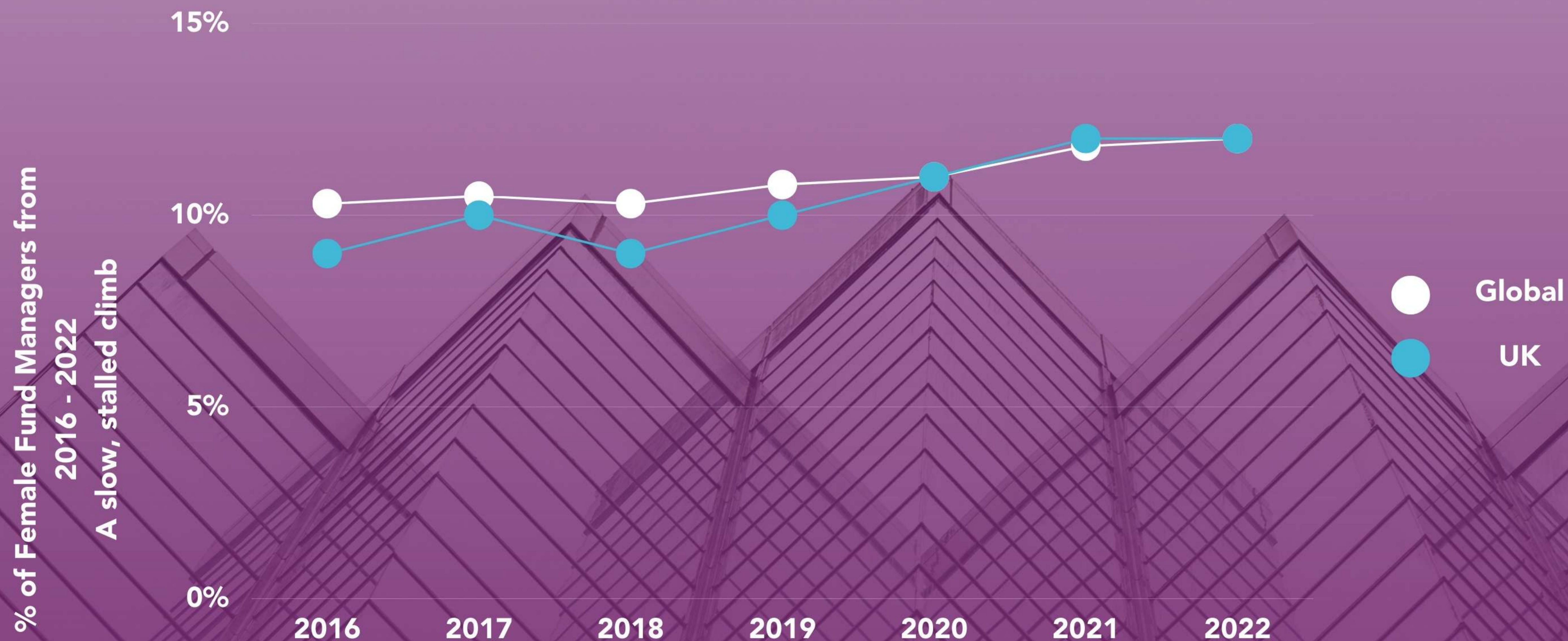
Get in touch: upasna@diversityproject.co.uk / adriana@diversityproject.com

Find out more: www.diversityproject.com/DP-Pathway

LACK OF FEMALE FUND MANAGERS IS A GLOBAL PROBLEM

Only 18% of the world's funds are run by a woman or a team with at least one woman, according to [Citywire's Alpha Female Report](#) published in 2022, which tracks just over 17,500 active managers. In the UK, 193 women fund managers make up around 12% of the sector's workers.

Citywire has calculated it would take until 2215 – nearly 200 years - to achieve parity between male and female fund managers. This is despite growing evidence that mixed teams make better decisions and, crucially, more money.



Source: Citywire Alpha Female Report

Baroness Helena Morrissey, Chair of the Diversity Project, says: "This programme has the potential to be revolutionary for the asset management industry. Not only will it unlock hidden talent from across the industry and provide today's emerging female portfolio managers with the skills and confidence they need to succeed, it will also create a cohort of female portfolio managers who will navigate their careers together and provide an example for generations to follow. We're delighted that over 30 firms are involved in DP Pathway's first year and believe that this programme may finally solve the decades-old problem of too few female fund managers."

Pathway Programme - at a glance



First of its kind globally



Programme started in January
24 sessions



12 month programme



80 participants



44 companies represented



50+ industry leaders involved

Programme Experience



Forums with sponsors



Networking breakfasts



Interactive Zoom sessions

Programme Experience



In-person sessions



Video series



Career Development Plan



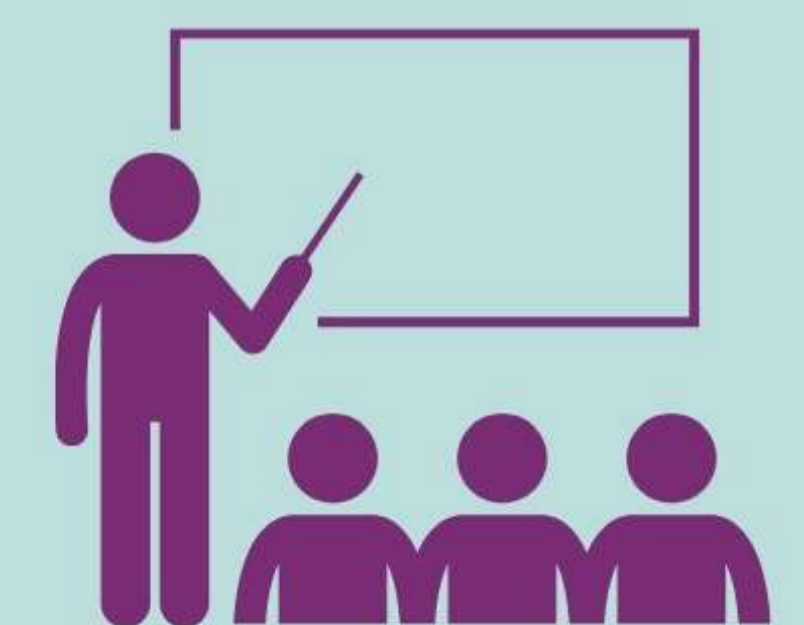
80 Sponsors



Social events



Updated curriculum



Technical bootcamp

NEW AND IMPROVED FOR 2024



Technical Bootcamp



“Post-session” follow-up exercises



Participants are required to attend 16 sessions to be able to graduate for Pathway 2024.



DP Pathway community platform



We have created a mini-Pathway network for 2023 and 2024 participants based in Edinburgh, across 4 different firms



2023 Alumnae programme

HIGH LEVEL CURRICULUM - THEMES



“It has been eye-opening and has made me even more thirsty to pursue a role in portfolio management”

“I have been able to meet like-minded candidates and inspiring portfolio managers who have generously shared their own experiences and personal journeys.”

“The programme encourages us to think about our careers from a three to five year point of view, be aware of opportunities and really be in the driving seat.”

[To find out what is included for each theme click here](#)

For 2024, we have added more content on Leadership, Behaviour and Brand.

We have also introduced 7 new sessions, and improved 6 existing existing sessions. This is an increase from 24 to 31 sessions for 2024.

APPLICATIONS FOR 2024 NOW CLOSED

Application requirements for your information

We aimed to have 80 participants in total with a combination of investment and non-investment backgrounds. Successful candidates must attend a minimum of 16 sessions to be eligible to graduate.

As a member company, the cost per candidate is £2.5k. For non member companies, the cost per candidate is £5k.

To become a member, get in touch info@diversityproject.com.

We have created a FAQ document, which you can find [here](#).

We suggest each candidate fulfils the following criteria:

CFA Level 1, IMC, IAD, PCAIM or CAIA TRAINING

Each candidate should have achieved or be on course to achieve CFA or equivalent qualifications, or have registered to study and take qualifications in the near future.

3+ YEARS OF EXPERIENCE

It is recommended that candidates have at least three years' work experience to benefit fully from the programme.

BACKGROUND

The aim is to create a diverse and inclusive cohort of women who wish to become portfolio managers. They may or may not already be working within an investment team. Others from different areas such as research, sales, trading, investor relations, legal, business development, compliance, etc. who have talent or have expressed interest in switching career to fund management are welcome.

ON THE JOB TRAINING

Crucial on-the-job training, arranged and provided by her own company, plus any other additional initiatives that the candidate company deems important.

SPONSOR

Each participant must have her own sponsor in the company. The sponsor will champion, advise and identify progression opportunities for their candidate. Ideally, the sponsor is not the participant's line manager (and can, of course, be male or female). To find out more about the role of a sponsor, [click here](#).

WHAT 2023 PARTICIPANTS ARE SAYING

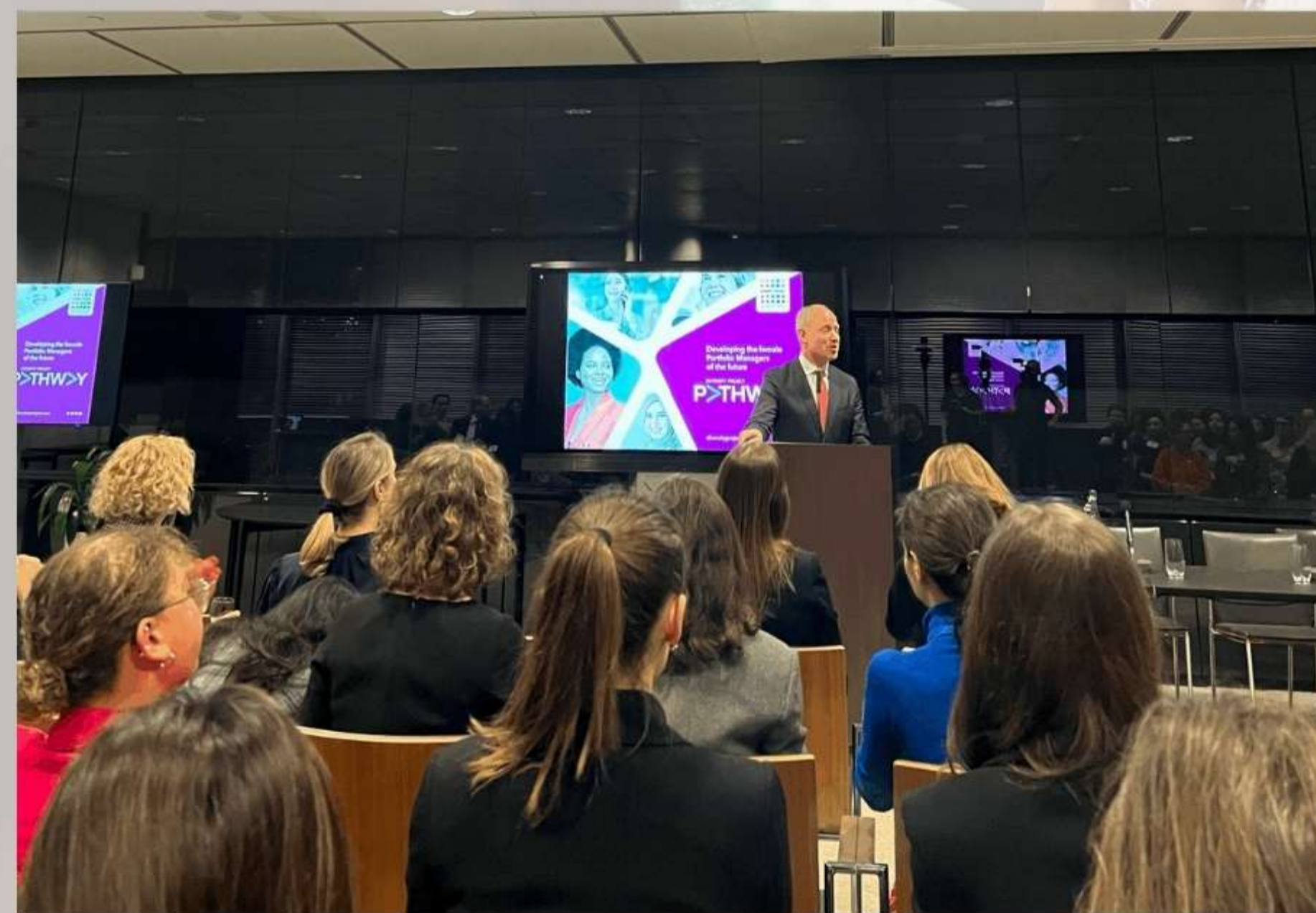


"If they can do it, I can do it."

"I have been able to meet like-minded participants and inspiring portfolio managers who have generously shared their own experiences and personal journeys."



"It's not just about how to be successful in portfolio management, but making sure that when we get there we can succeed and deal with any challenges."



93% rated the programme a 4 or 5 (out of 5)



2024 PARTICIPATING COMPANIES



If you have further questions, or would like to apply for the 2024 cohort we would love to hear from you: upasna@diversityproject.co.uk / adriana@diversityproject.com

www.diversityproject.com/DP-Pathway

#DiversityProjectPathway #ClosingThePMGap #FutureFemalePM