



P>THW>Y



Developing the female Portfolio Managers of the future

Candidate Brochure



Interested in becoming a portfolio manager?

Diversity Project Pathway is an award winning programme which focuses on developing the female Portfolio Managers of the future. It has been created by the industry for the industry. Launched in January 2023, we had 60 participants from 33 firms. In 2024, we have 80 participants from 40 firms.

This bespoke programme gives talented women who are selected by their companies the best opportunity to progress and succeed in becoming Portfolio Managers. You do not currently need to be in an investment role and your firm does not need to be a Diversity Project member to participate.



"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."

Why participate?

“Really enjoying the programme, think it is pitched at the right level and speakers so far have been very inspirational”



Accelerate your career

A bespoke curriculum created by the industry for the industry, which will help to facilitate your learning and take the steps towards becoming Portfolio Manager ready.



Navigate your career path

Work with industry professionals to create your Career Development plan and look at your career in three and five years time.



Broaden your knowledge

Designed by industry practitioners and experts in their field and further tailored to the candidates on the programme, you will be enabled to grow your knowledge, industry understanding and expertise.



Expand your network

Meet and interact with the right people. This is a great way to meet likeminded peers and have access to the right people, including successful portfolio managers, CEOs and other senior leaders from across the industry.



Boost your confidence

The Pathway programme will give you the tools to increase confidence and practical advice for career resilience, such as how to find comfort in your investment decisions and risk appetite. Additionally, the programme will teach you how to see your value, get your ideas across and voice heard.

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



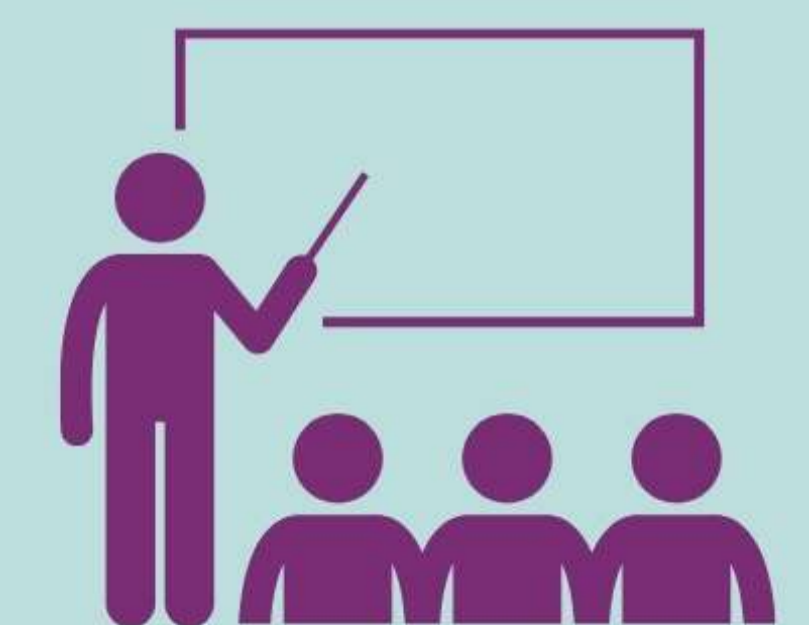
80 Sponsors



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.

2024 curriculum

DATE	SESSION	FORMAT
11TH JANUARY	*LAUCH EVENT: SPRINGBOARD TO THE PROGRAMME	5PM - 8PM
19TH JANUARY	'WHAT MAKES A GOOD INVESTOR'	2PM - 3:30PM
26TH JANUARY	INVESTMENT LANDSCAPE: TRADITIONAL & ALTERNATIVES	2PM - 3:30PM
1ST FEBRUARY	CEOS/CIOS PANEL: FUND MANAGEMENT INDUSTRY DEVELOPMENTS	4:30PM - 6PM
7TH FEBRUARY	PORTFOLIO CONSTRUCTION	4:30PM - 7PM
28TH FEBRUARY	NETWORKING AFTERNOON: PANEL OF SUCCESSFUL FEMALE MANAGERS SHARING JOURNEY	4:30PM - 6PM
8TH MARCH	*INTERNATIONAL WOMEN'S DAY	3PM - 5PM
11TH MARCH	MANAGING A MODEL PORTFOLIO	2PM - 3:30PM
15TH MARCH	RISK IN PORTFOLIO MANAGEMENT	2PM - 3:30PM
19TH APRIL	CAREER DEVELOPMENT PLAN	2PM - 3:30PM
24TH APRIL	LEADERSHIP AND OVERCOMING IMPOSTER SYNDROME	4:30PM - 6PM
3RD MAY	SAFE SPACE	2PM - 3:30PM
9TH MAY	TRADING IN MODERN FINANCIAL MARKETS	4:30PM - 6PM
15TH MAY	WHAT'S NEXT FOR ESG?	4:30PM - 6PM
5TH JUNE	DELIVERING TO YOUR CLIENT	4:30PM - 6PM
19TH JUNE	MID-YEAR EVENT AND PRESENTATION SKILLS	FROM 5:30PM
21ST JUNE	*CAREER DEVELOPMENT PLAN: DROP IN CLINIC	2PM - 3:30PM
19TH JULY	NAVIGATING PREGNANCY/MATERNITY (OPTIONAL)	2PM - 3:30PM
26TH JULY	*MODEL PORTFOLIO: DROP IN CLINIC	2PM - 3:30PM
11TH SEPTEMBER	BUILDING A PERSONAL BRAND	4:30PM - 6PM
13TH SEPTEMBER	*CAREER DEVELOPMENT PLAN: DROP IN CLINIC	2PM - 3:30PM
20TH SEPTEMBER	DATA MANAGEMENT/MODELLING	2PM - 3:30PM
25TH SEPTEMBER	AI AND PYTHON-POWERED PORTFOLIO MANAGERS: HOW TECH CAN HELP YOU	4:30PM - 6PM
4TH OCTOBER	PAYING IT FORWARD PROJECT	2PM - 3:30PM
9TH OCTOBER	CAREER ACTIVISM: KNOW YOUR VALUE	4:30PM - 6PM
8TH NOVEMBER	*KNOW YOUR VALUE: DROP-IN CLINIC	2PM - 3:30PM
15TH NOVEMBER	GRIT: HONING YOUR CAREER RESILIENCE	2PM - 3:30PM

22ND NOVEMBER	PERSONAL PATHWAY: PROACTIVELY MANAGING CAREERS AND CHALLENGES	2PM - 3:30PM
LATE NOV / EARLY DEC	*CHRISTMAS DRINKS	FROM 5:30PM
3RD DECEMBER	*PRESENTATION ON MODEL PORTFOLIO	2PM - 3:30PM
4TH DECEMBER	GRADUATION AND AWARDS CEREMONY	FROM 5:30PM

To be eligible to graduate from the programme, participants must attend a minimum of 16 sessions

* Optional sessions

IN-PERSON

VIRTUAL

HYBRID

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

APPLICATIONS FOR 2024 NOW CLOSED

Application requirements for your information

Your company can put forward up to three candidates. If they are a member of the Diversity Project, 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.

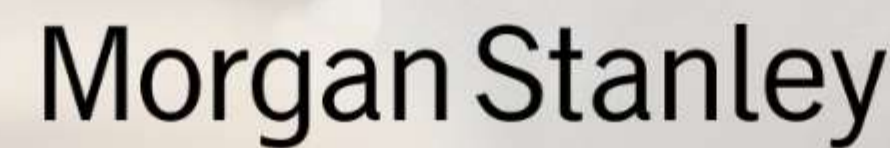
ON THE JOB TRAINING

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

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](#).

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